HMIS CLIENTTRACK USER MANUAL 2.0

2017

A guide to navigating ClientTrack, a web-based case management tool, including entering basic client information to managing caseloads and reports.

TABLE OF CONTENTS

Objectives 1

Contacts 2

Staff 2

HMIS Help Desk 2

Security Policies & Procedures 3

Privacy and Client Information Restrictions 3

ClientTrack Computers 3

Logging Into the System 4

Overview of ClientTrack Features 5

User Dashboard 5

Case Management Tools 7

Client Record 8

Household Members 11

Notifications 12

Entering Client Information and Managing Project Enrollments 13

Finding a Client 13

Project Enrollment 14

Adding a New Client with Project Enrollment 14

Definitions of Basic Client Information Requirements 16

Adding Household Members 17

Project Enrollment 19

HMIS Universal Data Assessment 20

Definitions of Universal Data Requirements 21

HMIS Barriers Assessment 21

Domestic Violence Assessment 21

Financial Assessment 22

Definitions of Sources of Income 23

Definitions of Non-Cash Benefits 23

Pausing a Workflow 24

HMIS Universal Data Assessment for Child 25

HMIS Barriers Assessment for Child 25

Completing the Intake Workflow 26

TABLE OF CONTENTS

Unique Project Requirements at Entry 27
ESG 28
PATH 29
HOPWA 30
RHY 31
Adding Services 33
Case Notes 34
Update/Annual Assessment 35
HMIS Universal Data Assessment 37
HMIS Barriers Assessment 38
Financial Assessment 38
HMIS Universal Data Assessment for Child 39
HMIS Barriers Assessment for Child 40
Project Discharge 40
Enrollment Exit 40
HMIS Universal Data at Exit 41
HMIS Barriers Assessment at Exit 42
Financial Assessment at Exit 42
Exit for Child 43
HMIS Universal Data at Exit for Child 43
HMIS Barriers Assessment at Exit for Child 44
Completing Exit Workflow 44
Unique Project Requirements at Exit 45
PATH 45
HOPWA 46
RHY 46
Submitting a Help Desk/Support Issue 47
Basic Reports 48
Service Summary 48
Annual Performance Report (APR) 50
Finding Missing Data 52
Completing or Editing Missing Data 53

CLIENTTRACK USER MANUAL

Objectives

Thank you for using ClientTrack as your Homeless Management Information System (HMIS). HMIS is an electronic data collection system that stores longitudinal client-level information about persons who access a variety of services for homeless prevention and/or rapid re-housing services. HMIS is a valuable resource from the participating homeless assistance and homeless prevention projects in a Continuum of Care (CoC). Aggregate data can be used to understand the size, characteristics and needs of the population at the local, state and national levels. HMIS enables information about client needs, goals and service outcomes.

The content in this user manual will provide information on all of the basic features of ClientTrack and detailed guidance on your day to day data entry, as well as helpful case management tools to optimize your services and time. We believe you will find this web-based case management system easy to use and essential in sharing your impact.

In this manual you will find the following information:

- Contacts
  - HMIS Help Desk Information
- Review Security Policies and Procedures
  - Consent Policy
  - Computer Storage
  - User Name and Password
- Overview of ClientTrack Features
  - User Dashboard
  - Case Management Tools
  - Client Record
  - Household Members
- Entering Client Information and Managing Project Enrollments
  - Intake Workflow
  - Services
  - Case Notes
  - Update/Annual Assessment
  - Exit Workflow
- Submitting a Help Desk Ticket/Contacting GA HMIS Support Staff
- Basic Reports
  - Service Summary
  - Annual Performance Review (APR)

Contacts

GAHMISSUPPORT@DCA.GA.GOV

HMIS Help Desk
If you encounter any issues with ClientTrack at any time, please contact the help desk with the email address below. Please do not send any identifying information for clients when emailing the help desk. There is a unique client ID number assigned to each client record in the system and you can find this number by hovering over the client name at the top of the client record. **Please use the ClientTrack client ID number when emailing the help desk if applicable.**

HMIS Help Desk: GAHMISsupport@dca.ga.gov

Security Policies & Procedures

Personal Protected Information (PPI) is considered any information that could lead to individual identification. Agencies participating in HMIS should have procedures in place for the secure storage and disposal of hardcopy and electronic data generated from ClientTrack or created for entry into ClientTrack. PPI should be stored in locked drawers/file cabinets and hardcopy data should be shredded before disposal. Electronic PPI including data contained on disks, CD's, jump drives, computer hard drives and/or other media should be reformatted before disposal.

PRIVACY AND CLIENT INFORMATION RESTRICTIONS

The Notice of Privacy Practices including the purpose for data collection should be posted in a public area and in an office where an intake professional meets with clients. The full privacy policy notice should be posted on the web sites of agencies, as well as made available to clients who request it. The document is called "Intake Posting" and can be downloaded from the Georgia Department of Community Affairs website at **http://www.dca.state.ga.us/housing/specialneeds/projects/hmis.asp**

In order share transaction date (enrollments and services) a signed client consent form is required. A client who presents to your agency for services and provides information needs to provide consent to share certain data in ClientTrack. Data collection and data sharing are topics that should be discussed with the client at the time of intake. Some project enrollments (and information related to those enrollments) are restricted and only the enrolling organization will have access to those records. ***No person should be refused services regardless of their participation in ClientTrack.***

CLIENTTRACK COMPUTERS

All computers used to access ClientTrack should be situated in secure locations. ClientTrack computers in publicly accessible areas should be staffed at all times and not viewable by other individuals. All computers should be password protected, and the password you use to log onto your computer should NOT be the same password as your ClientTrack password, but rather a password to prevent access to the computer itself.

ClientTrack usernames and passwords should NEVER be shared with other users. Users should not keep username/password information in a public location (i.e., sticky notes on monitors or filed under HMIS or Password in a Rolodex). ClientTrack security policies require the use of strict passwords. Passwords must have:

- At least one number
- Between 8 and 12 characters
- At least one non-letter, non-numeric character
- At least one capital letter

New passwords will be required upon first login. **Accounts are automatically deactivated after** 60 **days of inactivity for security purposes.** You will be required to change your password every 60 days for security purposes. If you need assistance with your username and password contact the HMIS Help Desk by emailing GAHMISsupport@dca.ga.gov and someone will assist you.

CLIENTTRACK ACCESS

You can access HMIS with the following link:

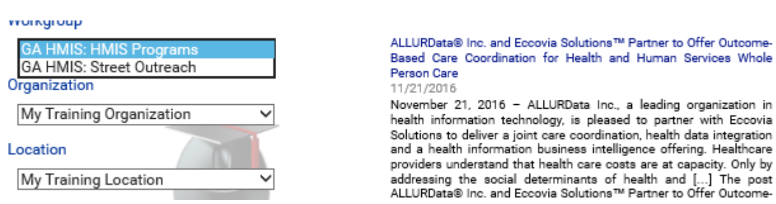
https://Clienttrack.net/GAHMIS

LOGGING INTO THE SYSTEM

ClientTrack is a web-based application and you will need to use an internet browser to access it. ClientTrack works with Microsoft Internet Explorer, Google Chrome, *Mobile* Safari and Mozilla's Firefox.

Open your web browser and go to https://clienttrack.net/gahmis. Enter your assigned User Name and Password and click "**Sign In.**" **Remember, sharing your user name and password is not permitted. Passwords are case sensitive and pop-up blockers must be turned off to access the application. You may need to change your settings to allow for pop-ups from this site.**

Click on "**Use These Settings**" or **"Sign In"** to continue. You will be required to "**Accept**" the Terms of Agreement when you log into the system for the first time.



Users will likely have access to TWO Workgroups. It is ***critical*** that you select the appropriate Workgroup based on the project for which you will be entering data.

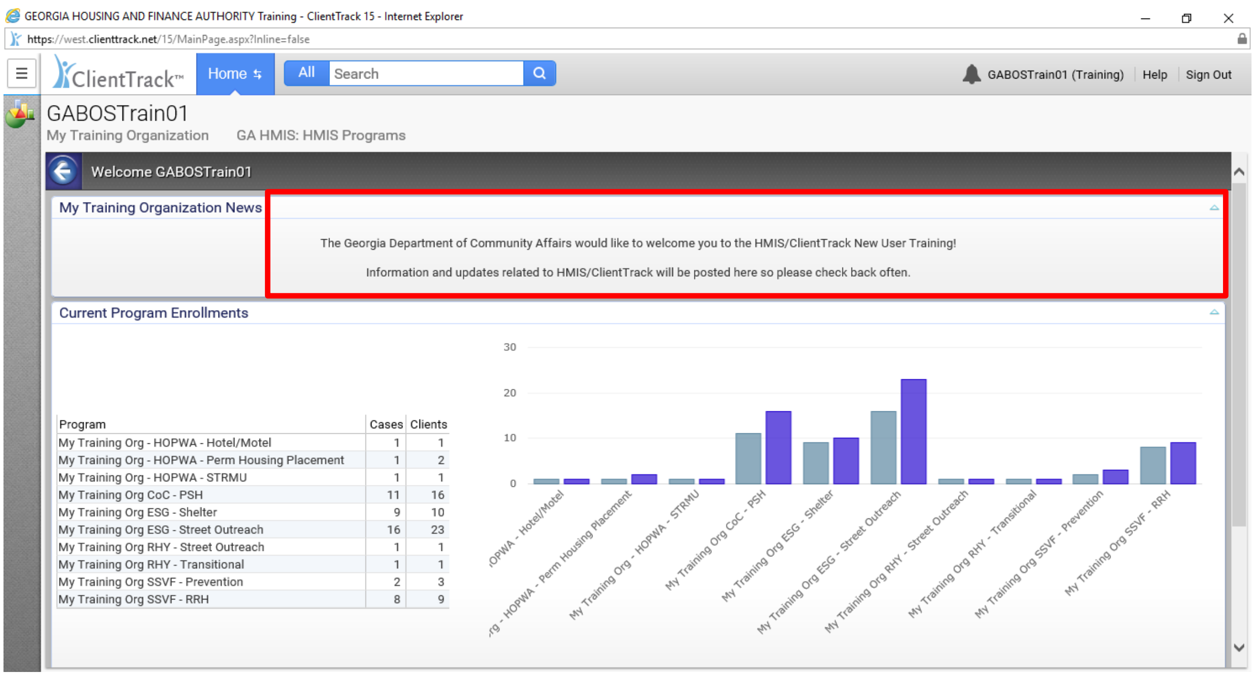
Most Users will choose the GA HMIS: HMIS Projects Workgroup (emergency shelter, transitional housing, rapid re-housing, prevention, services only, etc.)

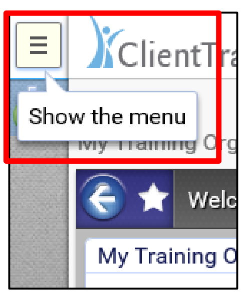
The GA HMIS: Street Outreach Workgroup should be utilized ***ONLY*** for street outreach projects, including PATH.

Overview of ClientTrack Features

USER DASHBOARD/HOME WORKSPACE

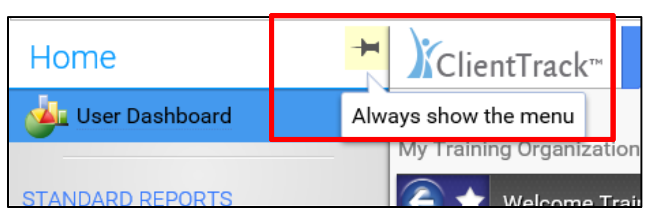
You will be directed to your **User Dashboard** on the **"Home"** screen and notified of any important **"HMIS News"** items the Office of Supportive Housing wants to communicate (i.e. upcoming trainings, changes etc.) – this is the first screen you come to after logging in.



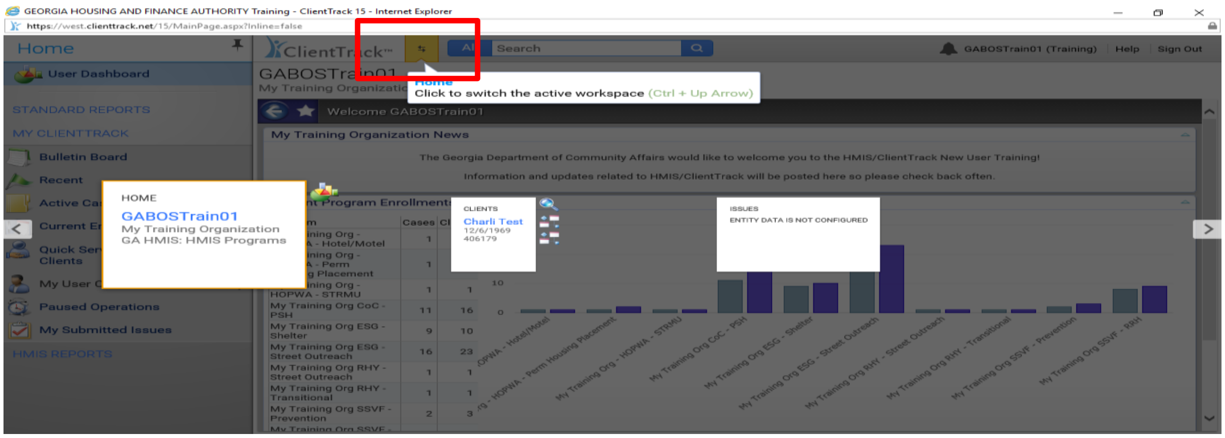


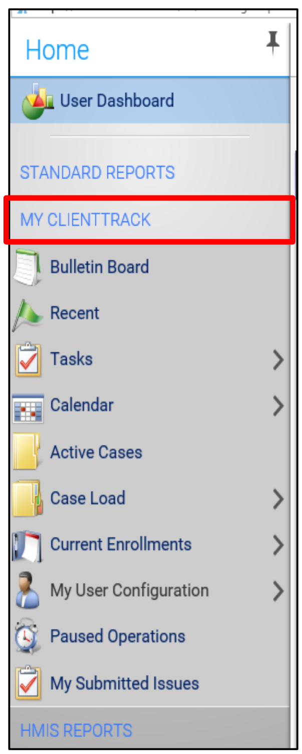
When you first log onto the system, you may want to "Pin" the menu on the left side of the screen. In order to "Pin" the menu, click on the box highlighted in red below.

Once the Menu is visible, click on the push pin to keep the menu visible. This is same process when using the various workspaces.



You can access all three screens, **"Home," "Clients"** and **"Issues"** which provide you different features for managing your cases by clicking on the link with arrows beside the ClientTrack logo outlined with the red box below. After clicking on that icon, you will see the three boxes appear labeled, **"Home," "Clients"** and **"Issues"** and you can toggle between them by clicking on the appropriate box to take you to that section of ClientTrack as seen below.





On the **"Home"** screen there is also a list of **Menu Items** that give you easy access to your current case assignments, case notes and more under **"My ClientTrack."** You can also change your password with the **"Change My Password"** link by clicking on **"My User Configuration"** in the list of Menu Items. All of these tools are designed to maximize your time and grant you easy access to your client records.

You will also find the **"Reports"** section on the **"Home"** screen. To run a variety of reports, which will be detailed later in this manual, click on **"Reports"** found above **"My ClientTrack"** in the upper left-hand corner of the screen to access reports.

"Active Cases" will show a list of clients for which you are designated as the Case Manager. This is not necessarily the clients actually enrolled in you project.

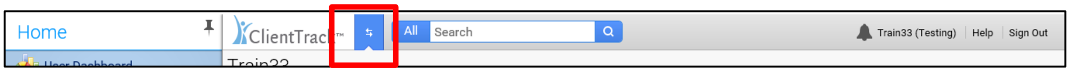
"Current Enrollments" will allow you to select a particular project and view clients that have an official open enrollment in the selected project.

You can view and complete any Paused Workflows by selecting the **"Paused Operations"** menu option.

You can manage **Issues** that have been submitted to Help Desk via the ClientTrack Issues Workspace.

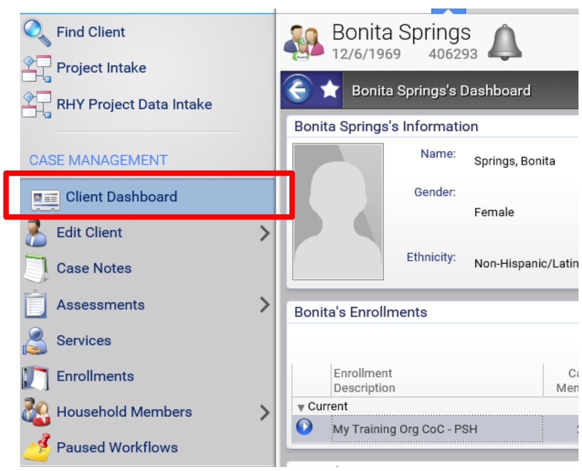
SELECTING THE CLIENT WORKSPACE

In order to transition to the Client Workspace, click on the link with arrows beside the ClientTrack logo outlined with the red box below and select the Client Workspace.



CASE MANAGEMENT TOOLS

In the **"Clients"** Workspace, you will find the most recent client record you were on as well as a list of **Case Management Tools** on the left-hand side of the client record. The following information outlines features and tools found on the client record, and to access these features, hover on the link in the case management section and a list of tools will appear as seen in the red box:



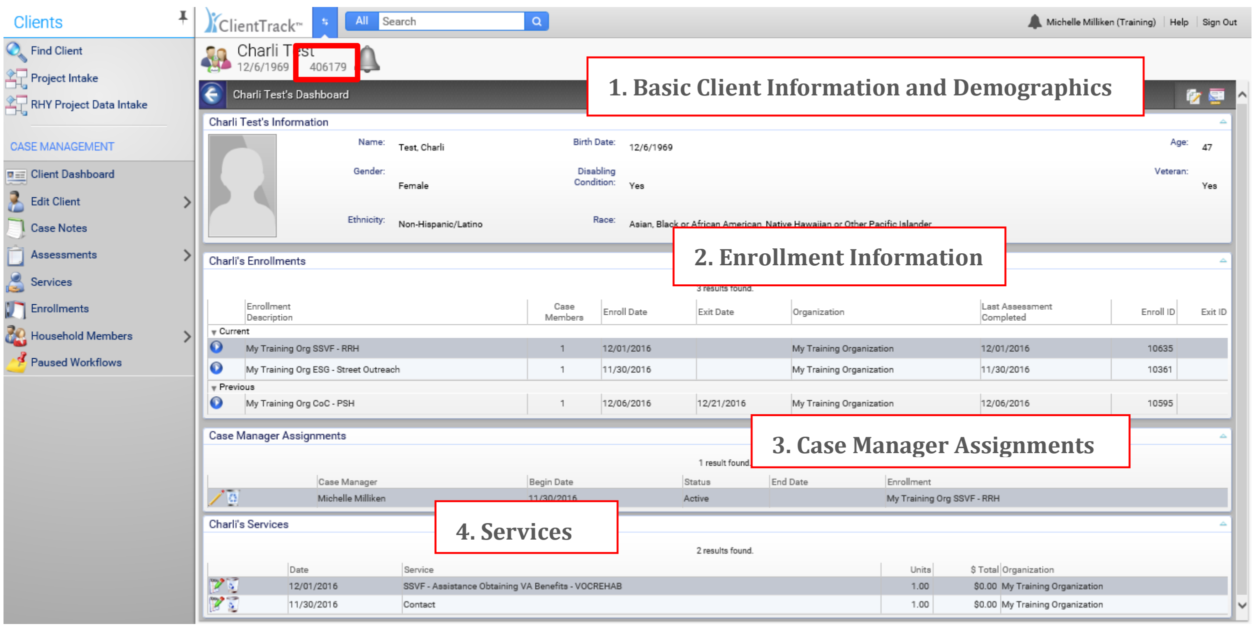
- **Find Client** – To search for a client in the system by first and last name, date of birth, social security number, client ID number, etc. Remember, you will get the most returns if you only use the first few letters of the first and last name of the client.
- **Project Entry** – To enroll a client in your project. **RHY Project Data Intake** is designated for projects funded by the Runaway and Homeless Youth project and will call very specific assessments related to those projects.
- **Case Management Tools:** *(Frequently Used)*
    - **Client Dashboard** – The overview of the client record as seen on the next page.
    - **Edit Client** – To edit basic client information like address, date of birth, social security number, disabling condition, veteran status, etc. There are more helpful tools under "Edit Client" that are available for you to use depending on your agency's needs and requirements. You can add "Interested Others", Review an Alias Name History, Review Address History, Update Case Manager Assignment and Review Notifications.
    - **Household Members** – To review household members and manage household accounts.
    - **Assessments** – To review assessments and please note that all required assessments for your project are captured in the Intake Workflow.
    - **Enrollments** – To view the list of current and past enrollments.
    - **Services** – To add, edit and view the list of services the client has received.
    - **Referrals** – To add and manage referrals provided to a client.
    - **Case Notes** – To create, edit and view case notes.
    - **Paused Workflows** – To resume a workflow you previously paused.

- **Basic Client Information -** Located at the top of the client record and includes the client's name, gender, date of birth, etc. The client ID number can be found in the client demographic section of the Client Dashboard (Client ID Number is required when communicating electronically about a client record, i.e., requesting assistance from the help desk).

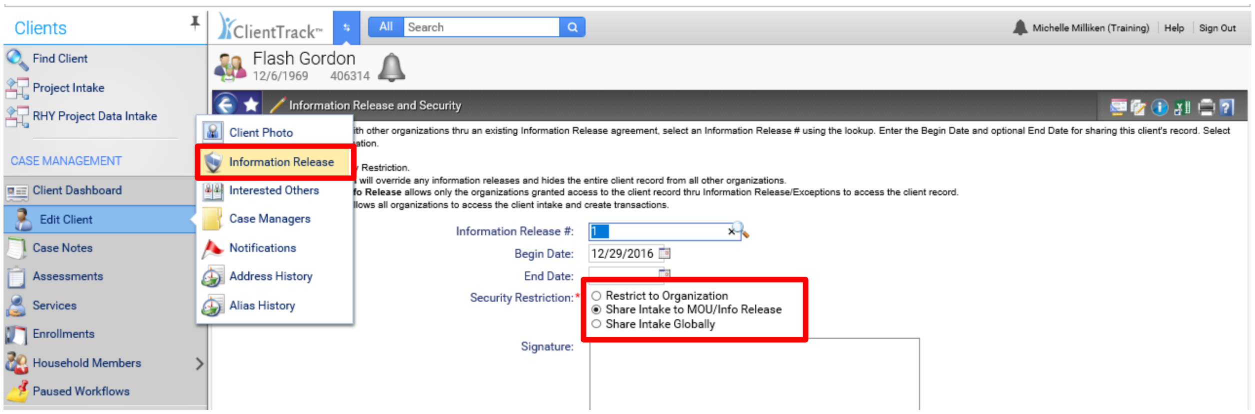
CLIENT RECORD

The client record is broken up into sections with case management tools to help you easily find client information and manage project enrollments, services, case notes, and more.

1. At the very top of the client record, you will see the **client's basic information** and demographics as shown below. You can find the client ID number (in the red box) in the client demographic area, which is automatically assigned to the record when created.



Data Sharing Information - In order to see and share transaction information on a client with other organizations AND the client has signed a consent form to share information, you will need to change the Information Release in the system. You will go to the Client Dashboard and hover over the Edit Client menu option. Select the Information Release from the sub-menu.

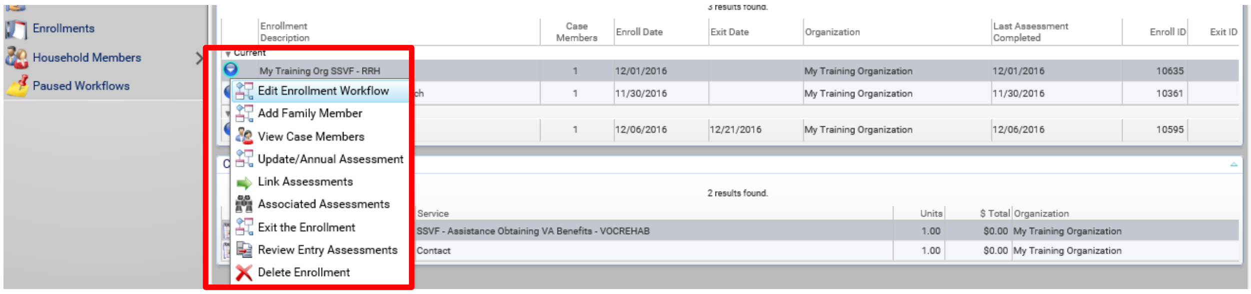


All client records imported from the previous HMIS will have a Security Restriction of "Share Intake Globally" which means all organizations will have access to a Client Record but not transaction data such as enrollment or services information. If the client signs a consent to share information, you can change the Security Restriction to "Share Intake to MOU/Info Release". **You will need to add a "1" in the Information Release # field.** Changing the Security Restriction will allow you to see transaction information from other organizations. Enrollment and service transaction data for "Protected Agencies" will be restricted by ClientTrack and remain restricted regardless of the Security Restriction.

Barrier (special needs) information and Case Notes are not shared between organizations regardless of the Security Restriction.

Please **DO NOT use the Restrict to Organization** as the Security Restriction. If you use this option, the Client Record will NOT be visible by other organizations and they will not be able to search or access the Client Record.

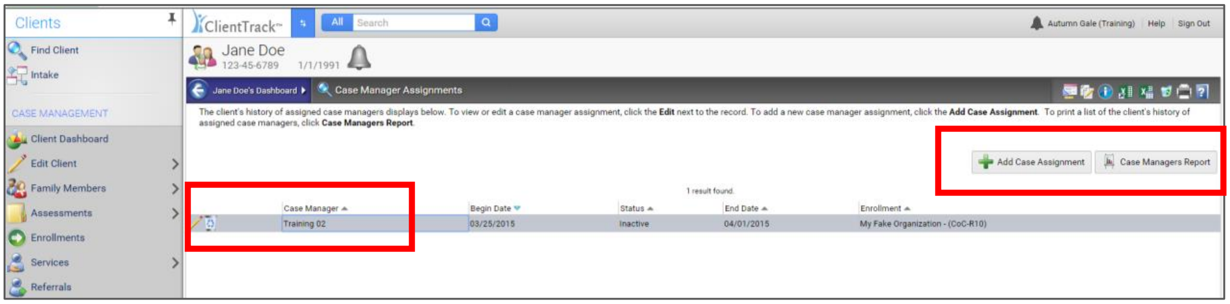
2. In the center of the client record, you will see all of the client's past and present **project enrollments** as seen below.



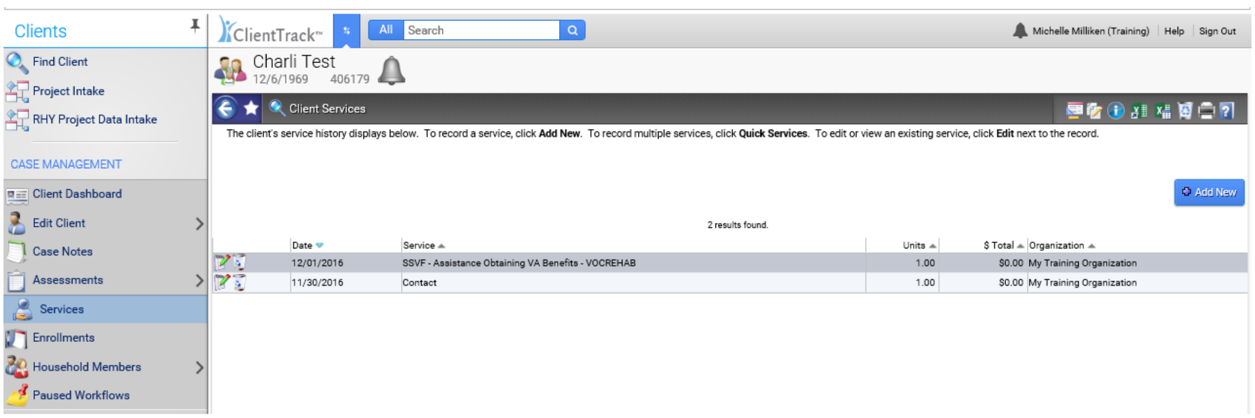
There is a blue play button/action wheel (as seen in the red box above) you can click on to easily manage your project enrollment. When you click on the blue play button, a drop down list will appear where you can:

- **Edit Enrollment Workflow** – Edit the enrollment date with this feature.
- **Re-enter the Enrollment** – Use this feature to re-enroll a client who was *accidentally* discharged or his/her enrollment status changed to continue services. This option should be used sparingly and is only allowed certain circumstances.
- **Add Family Member** – Use this feature if a new household member needs to be added to the household and enrolled after an enrollment has already been established, i.e., a new baby is born and needs to be enrolled. Make sure you're on the head of household's client record when adding a family member to the enrollment.
- **View Case Members –** View all case members associated with the specific project enrollment. Use this option to verify which household members are actually enrolled in a project. The list of household members found on the family icon/family portrait does not necessarily indicate which members are actually enrolled in your project.
- **Update/Annual Assessment** – Use the Update/Annual Assessment to conduct annual assessments or capture changes to a client's status since enrollment. You will also use this workflow to update an enrollment with a Move in Date (RRH projects) and Engagement Date/PATH Enrolled Status (street outreach/PATH projects).
- **Exit the Enrollment –** To exit a client, select "Exit the Enrollment" and you will be prompted through the exit workflow for the client and all household members if applicable. If you need to only exit one household member, go to the specific household member's client record and conduct the exit workflow without exiting the household.
- **Review Entry/Exit Assessments** – You can review the assessments completed at entry and exit with this feature without going through the workflow. This is helpful in completing missing or inaccurate data that was not captured at those points in time.

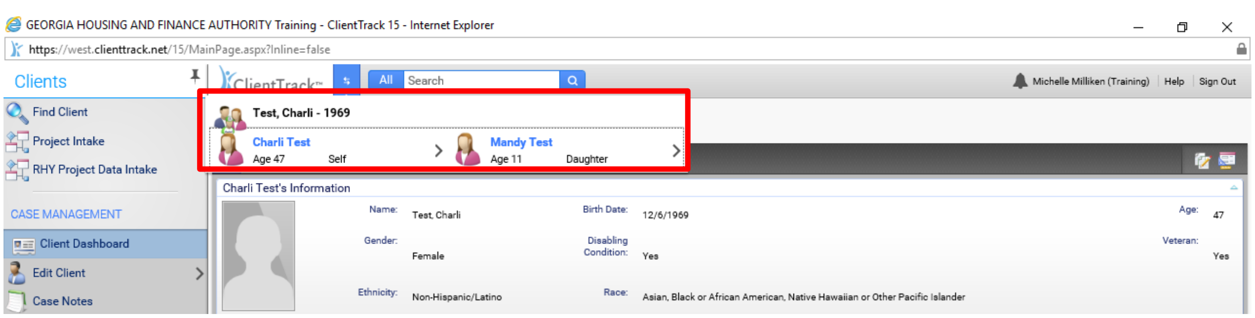
3. Case Manager Assignments can be managed by clicking on the case manager assignments link, you will be taken to a screen where you can edit the status of a case manager for a specific project enrollment or add new case managers to the client record.



4. Services associated with a specific project enrollment will be listed at the bottom of the client record. You can manage your client services by clicking on **"Services"** in the list of case management tools on the left-hand side of the client record or by clicking **"Services"** above the list of services on the client record. Documenting services is discussed in detail starting on page 32 of this manual.



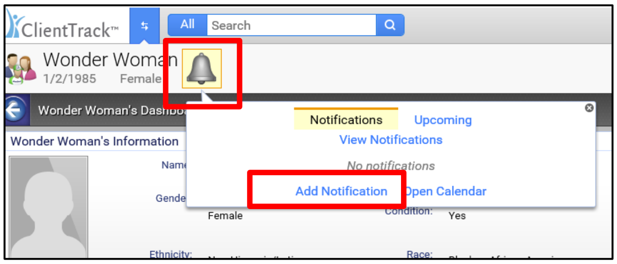
HOUSEHOLD MEMBERS



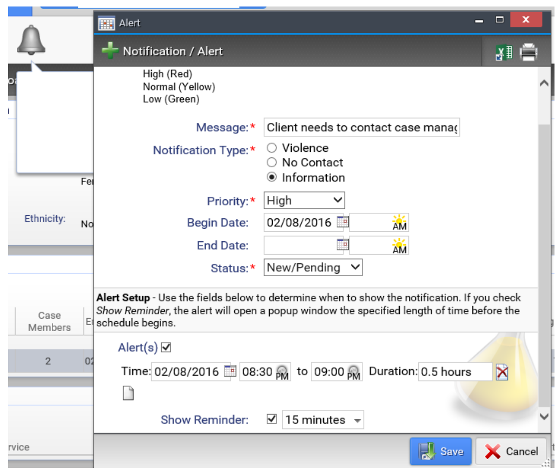
You can view household members and their client records by clicking on the **Family Icon/Family Portrait** at the top of the client record beside the client name. A window will appear with all of the current household members. You can click on the names of the household members in the window to go directly to his/her client record.

NOTIFICATIONS

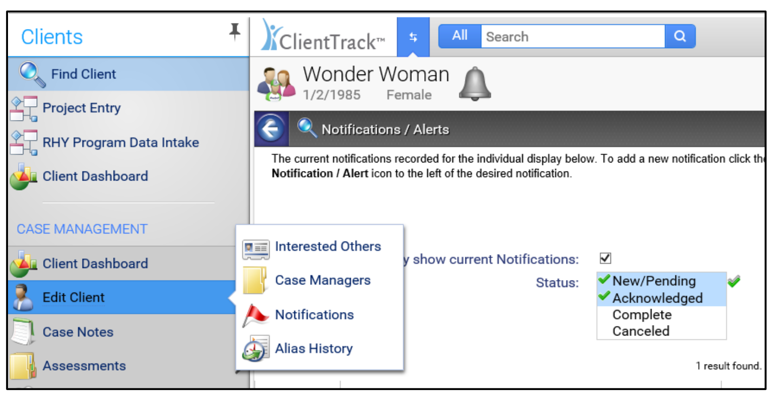
ClientTrack features a **"Notifications"** tool on the client record that allows you to set up alerts specific to the client, like recurring appointments, required documentation, client deadlines, etc. The Notifications tool is located beside the client's name at the top of the client record. To add a new notification, click on the bell and a new window will appear below it. Select **"Add New"** to add a new notification.



A new window will open where you can set up the new notification as seen below.



After setting up the notification, you can review your notifications and calendar by clicking on the bell and selecting **"View Notifications"** as seen below. You can also view notifications by hovering on the Edit Client menu option on the left of the client record.



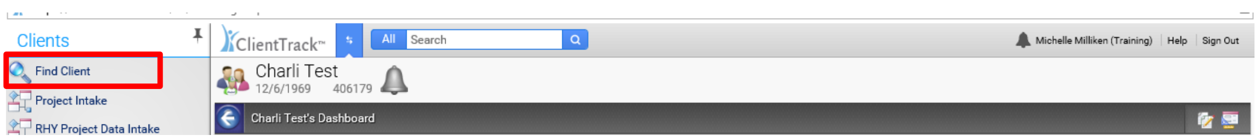
Entering Client Information and Managing Project Enrollments

FINDING A CLIENT IN THE SYSTEM

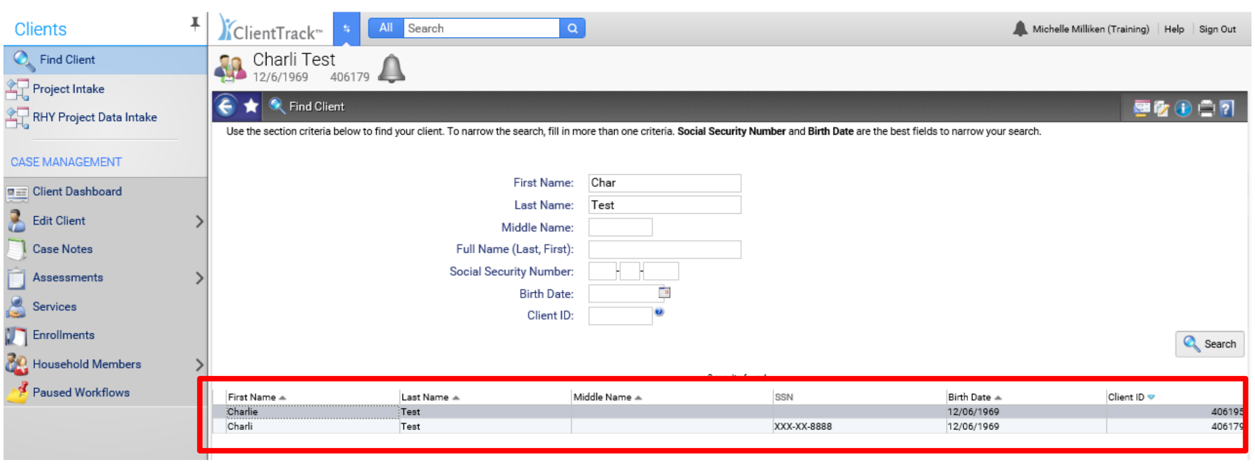
Before entering a client into the system as a new client, **you should ALWAYS conduct a search for the client** to see if there is an existing client record in the system. To search for a client, go to the **"Clients"** screen as seen below and click on **"Find Client"** in the upper left-hand corner of the screen as also outlined in red below.

It is imperative you do not enter a duplicate client record into the system in order to ensure the accuracy and overall quality of the data. To speed the search process and reduce the chance for input error, input as few characters as possible in the criteria fields. You may search for a client by entering one or more of the following:

- Letters of the client first/last name (use as few letters as possible of the first and last name to conduct a thorough search)
- Social Security Number
- Birth Date
- Client ID Number



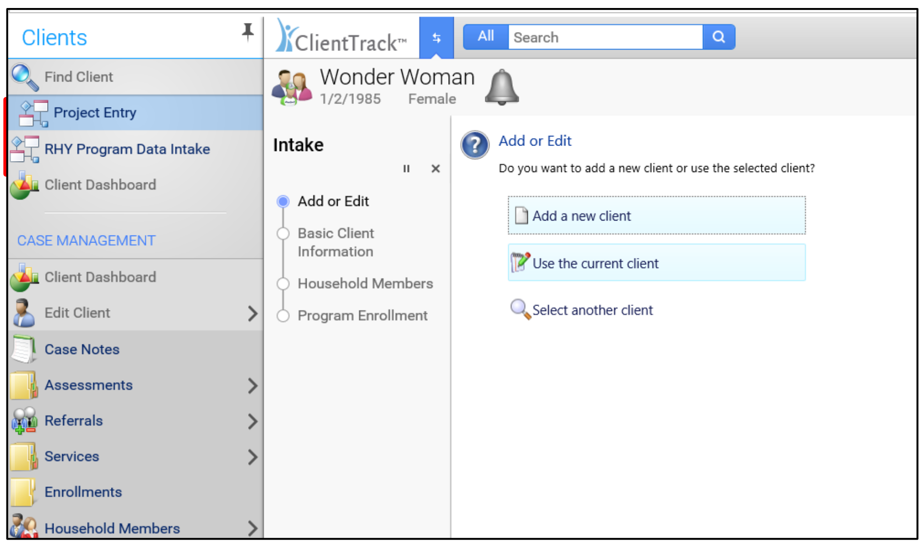
It is important to try different options for your search. **Again, it is best to ONLY enter the first few letters of the first/last name and not rely solely on a social security number or birth date, as those elements have a higher rate of missing or inaccurate data.** Another option for searching is to search different spellings of the client's name and remember to search for nicknames such as "Joe" in addition to "Joseph" or "Jen" in addition to "Jennifer."



If the client is already in the system, highlight the client name in the search results and click on the **Client Name** to select that record. The selected client's information will be displayed at the top of the screen and all information entered from this point forward while on the client's dashboard will be associated with the currently selected client.

> HMIS Support staff continually work to eliminate duplicate clients in ClientTrack. Please contact the HMIS Help Desk or submit an "Issue" with clients who have multiple records in the system. When sending a notification of duplicates or any information regarding clients to the Help Desk, please **ONLY** send **Client ID numbers.** Client ID numbers are found on the Find Client search screen and in the area of the Basic Demographics on the Client Dashboard.

After selecting the client in the search list and going to the client's dashboard, you can begin your enrollment by going to the Project Intake, RHY Project Data Intake workflow or Street Outreach workflow (Street Outreach Workgroup). Please remember, the RHY workflow is specific to Runaway and Homeless Youth projects. If you are using an existing client record, you would choose the **"Use the Current Client"** option and follow the steps in the workflow. If you did not find an existing client record in the system, you would select **"Add a New Client".**

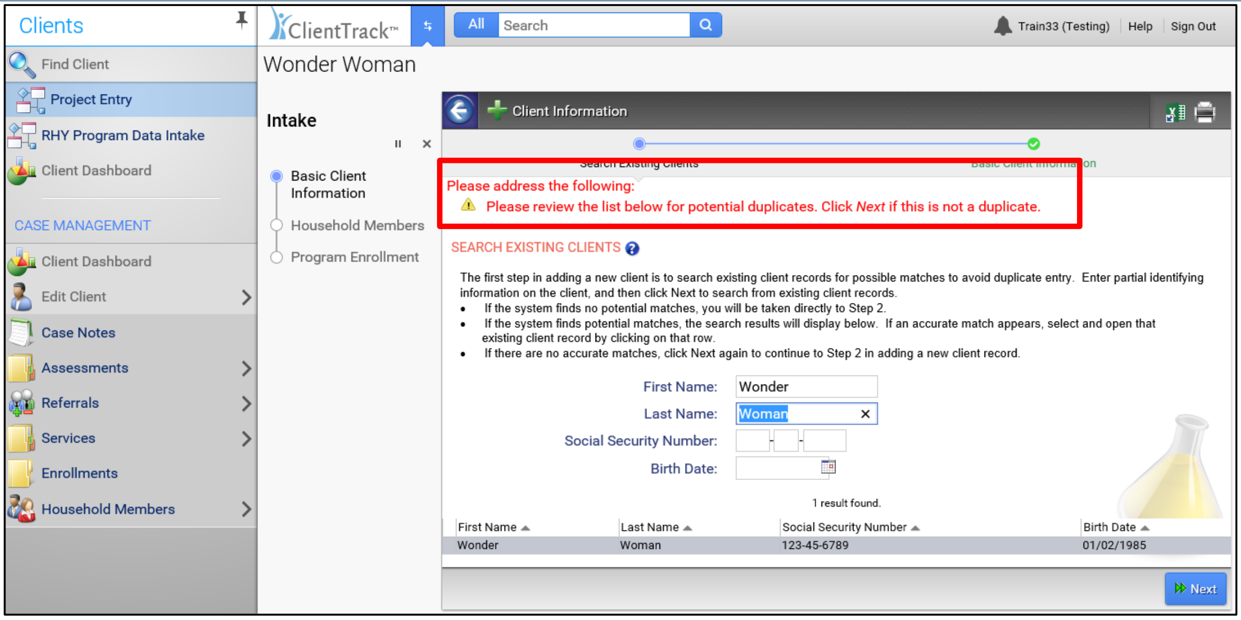


ADDING A NEW CLIENT WITH PROJECT ENROLLMENT

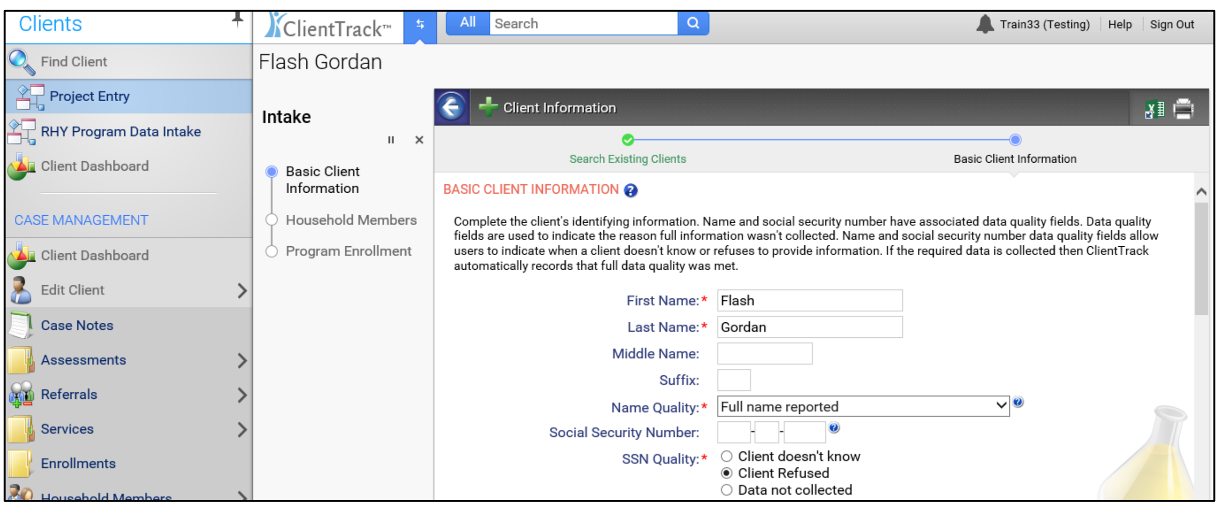
ClientTrack utilizes a specific workflow to step you through the process of completing all required assessments at entry and discharge. The workflow is easy to use and it automatically prompts you for the required information based on the workflow and project you choose.

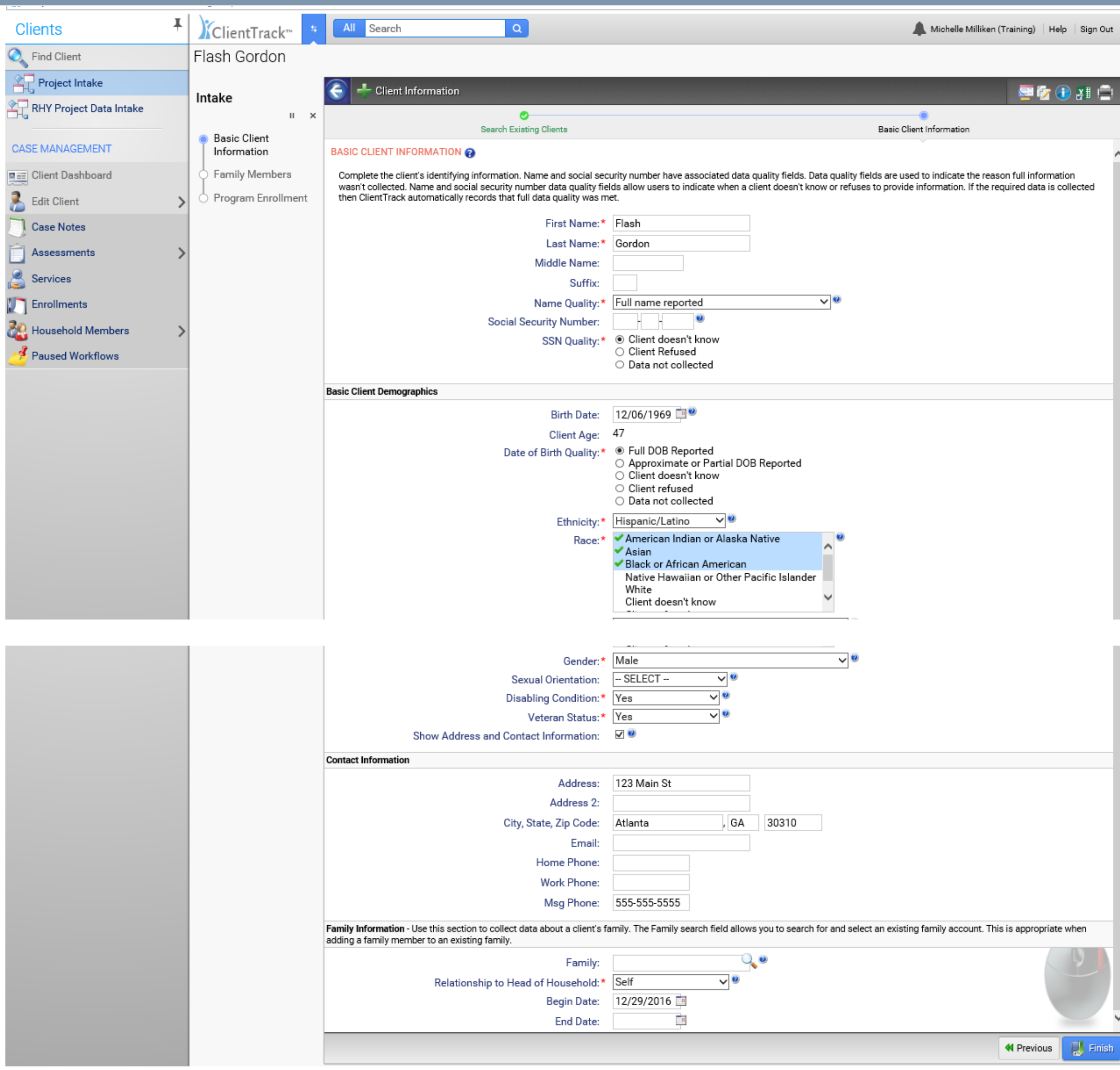
After conducting a search for the client in the system to ensure an existing client record does not already exist, you can add a new client record by selecting **"Project Entry"** in the upper left-hand corner of the screen found under **"Find Client."** Then choose **"Add New Client"** when prompted as seen above.

Enter your client's first and last name and click **"Next."** If a duplicate client already exists and was not identified during the client lookup, **a warning in red letters** will be displayed. It is very important to review the displayed list. If the client is already in the system, click the client's name to select the existing client record. If the client you are entering is a new client or you cannot verify that the existing client is the same client you are working with, do not select a client in the displayed list, click "**Next**" to proceed with the intake process.



Add the client's basic information including date of birth, social security number, demographics, disabling condition, veteran status and address. Click **"Finish"** when the client's basic information is complete. **Please note that all of the data elements are self-declared by the client and not attributed by the case manager or data entry personnel. The option "Data Not Collected" indicates that the question was not asked of the client and will report as missing on reports. Do NOT make up information or answer on behalf of the client.**





Definitions of Basic Client Information Requirements

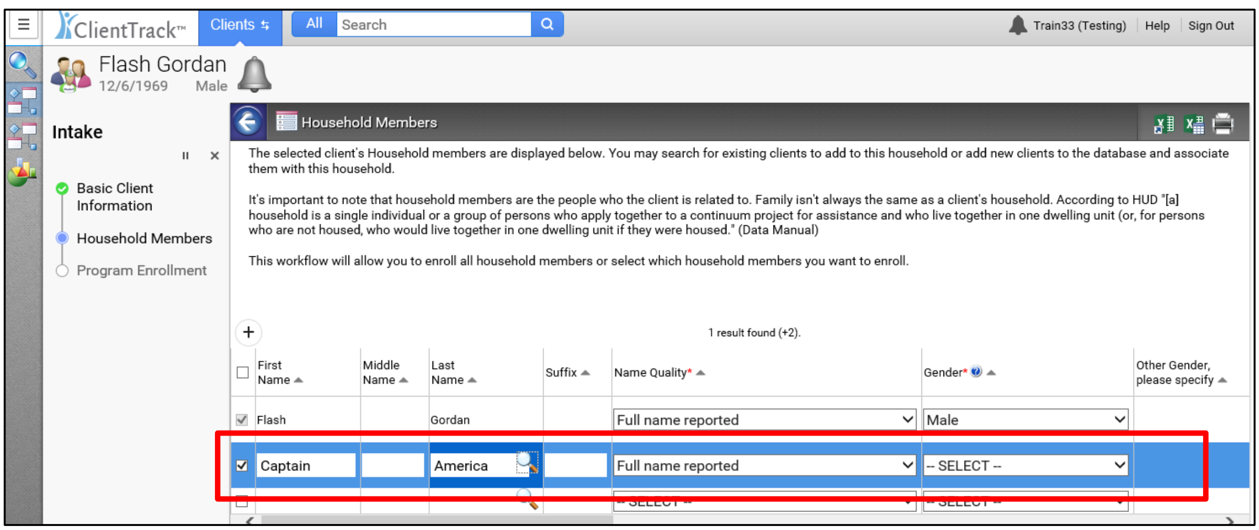
- **First Name -** Legal first name (do not add nicknames in "quotes" because those are not searchable elements).
- **Last Name –** Legal last name.
- **Social Security Number (SSN)** – If the client doesn't know or refuses to provide their SSN, **DO NOT, under any circumstance, enter a fake social security number** such as 123-45-6789 or 999-99-9999. Select the data quality option that best reflects the client's response.
- **Birth Date** – Month, day and year the client was born. Again, do not make up a birth date. Choose the appropriate data quality option that best reflects the client's response.
- **Ethnicity** – Hispanic/Latino origin includes individuals of Cuban, Mexican, Puerto Rican, South or Central American origin.
- **Race** – A person can identify with multiple races and this is a multi-select box that allows for multiple races to be checked at once. Click on all that apply.

- **Gender** – Select the gender with which the client identifies.
- **Sexual Orientation** – For use ONLY by RHY projects.
- **Disabling Condition** – Select the appropriate response as reported by the client. Please note that if the client reports at least one barrier on the Barriers Assessment, then the disabling condition status should be "Yes."
- **Veteran Status** – Select the appropriate response as reported by the client.
- **Address** – Add the address where the client currently resides (emergency shelter, etc.). If the client enters emergency shelter, you should use their previous address. If you edit a previously entered address, the system will maintain a history of current and previous addresses. These can be found under the Edit Client Menu options on the left of the screen.
- **Household** – Do NOT enter anything in the "Household" field. ClientTrack will create a household account.
- **Relationship to Head of Household** – When entering the first client in the household, the system will default to "Self." It is imperative this information is entered correctly for ALL household members. Otherwise, your reports will not accurately reflect the clients and household make-up. There can only be ONE Self in each Household.

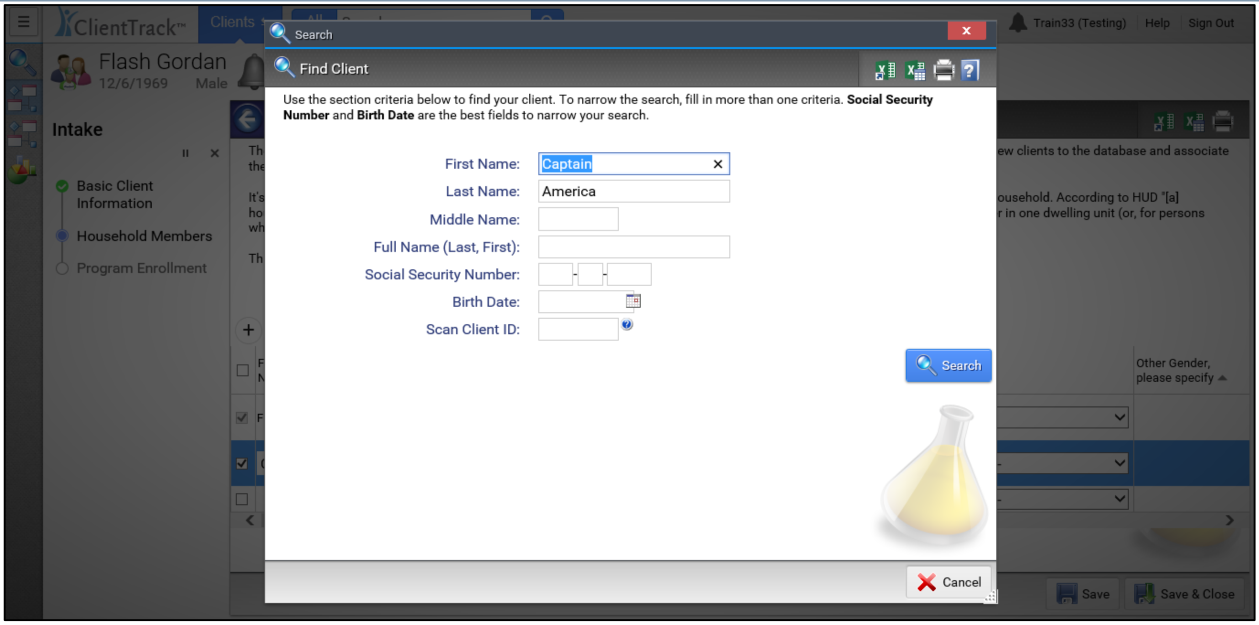
Once you have completed entering this data, select "Finish" to save the data you have entered and move to the next section of the workflow.

Adding Household Members

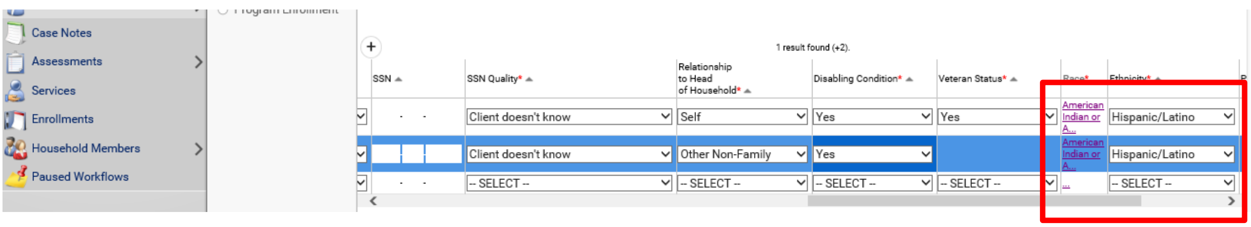
Next, you will be prompted to add additional household members to include for the project enrollment or services. To add household members, click on the empty box and complete the row of information (name, birth date, etc.) for the new household member(s). You can tab through the fields to complete the required information and add any number of household members at this time by repeating these steps.



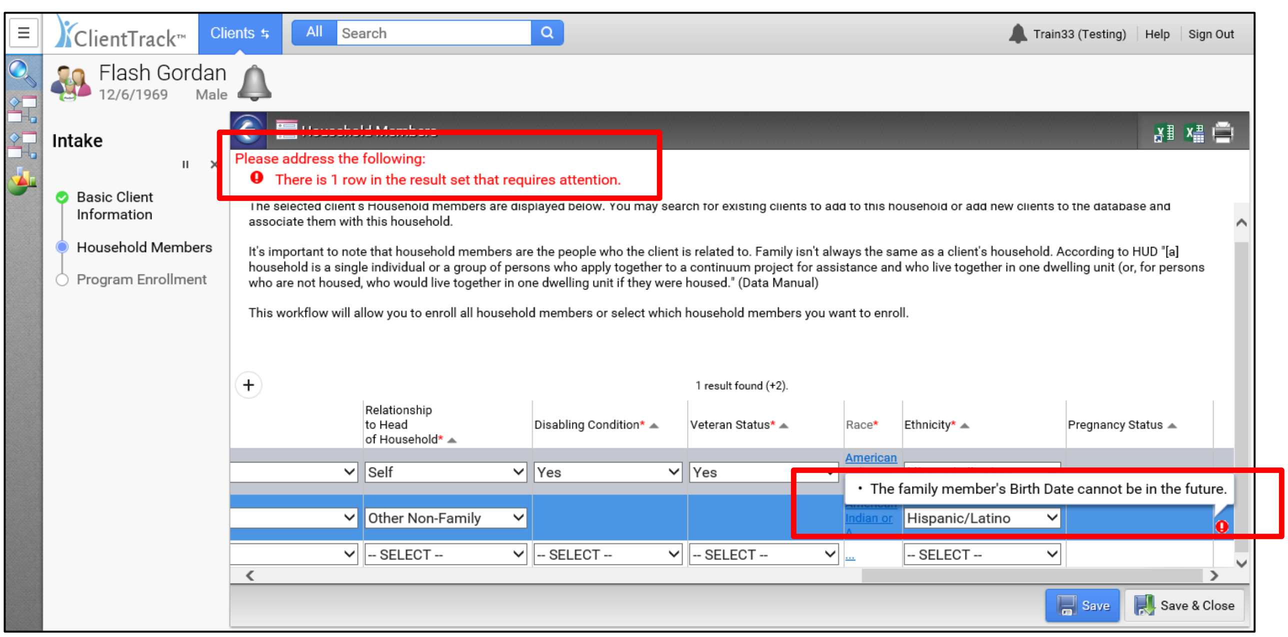
The system will automatically conduct a search for the new household member after you enter the first and last name. If the new household member is already in the system, click on the appropriate name in the search list that appears in the new window to attach the existing client record to the household. If the household member is a new client, click on **"Cancel"** in the search window and proceed entering the new household's information in the required data fields. Click **"Save & Close"** when finished adding household members.



Please pay close attention to the Race and Ethnicity fields when adding household members. They will default to the Head of Household selections. If you need to change the Race, click on the blue hyperlink, make necessary changes and click on the green circle with the check mark.



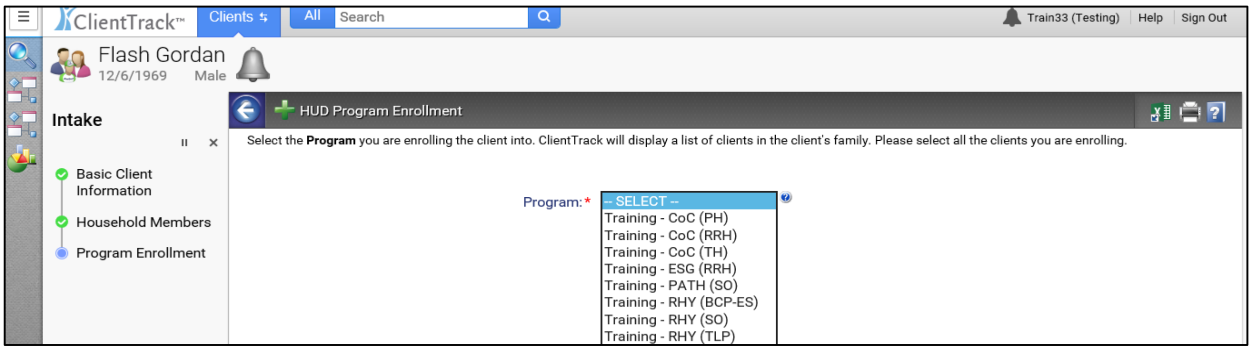
If you are alerted to an error after selecting **"Save & Close"**, you should scroll all the way to the right and hover over the red circle with an exclamation point. Go back and address the issues and choose **"Save & Close"** again.



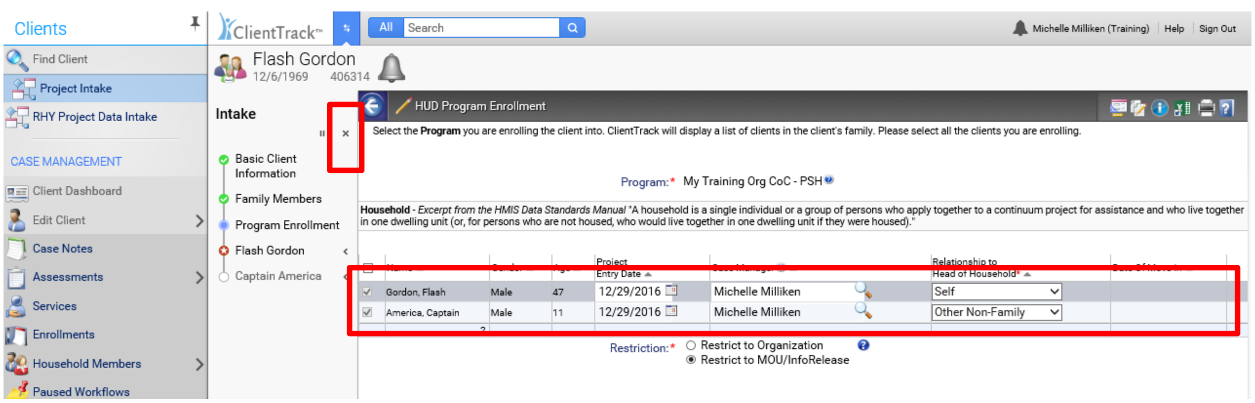
Please note that the "Save" button will save the changes made to the screen and leave you on the same page. The "Save & Close" button will save the changes you have made to the screen and move you to the next one.

Project Enrollment

Projects vary in their data requirements and ClientTrack will prompt you through the workflow to collect all of the required HUD (or other Partner agency) data elements for your specific project. Please note that all fields with an asterisk * are required data fields and you will not be able to proceed in the workflow until all of the required information is completed.



Select your **"Project"** with the drop down box and then select which household members to enroll by clicking on the box beside the client name. If a check mark appears by a client name on the project enrollment screen (as seen below), the client will be enrolled in your project. You can de-select a client by clicking on the check mark beside his/her name again to remove the check mark and ensure the client is not enrolled.

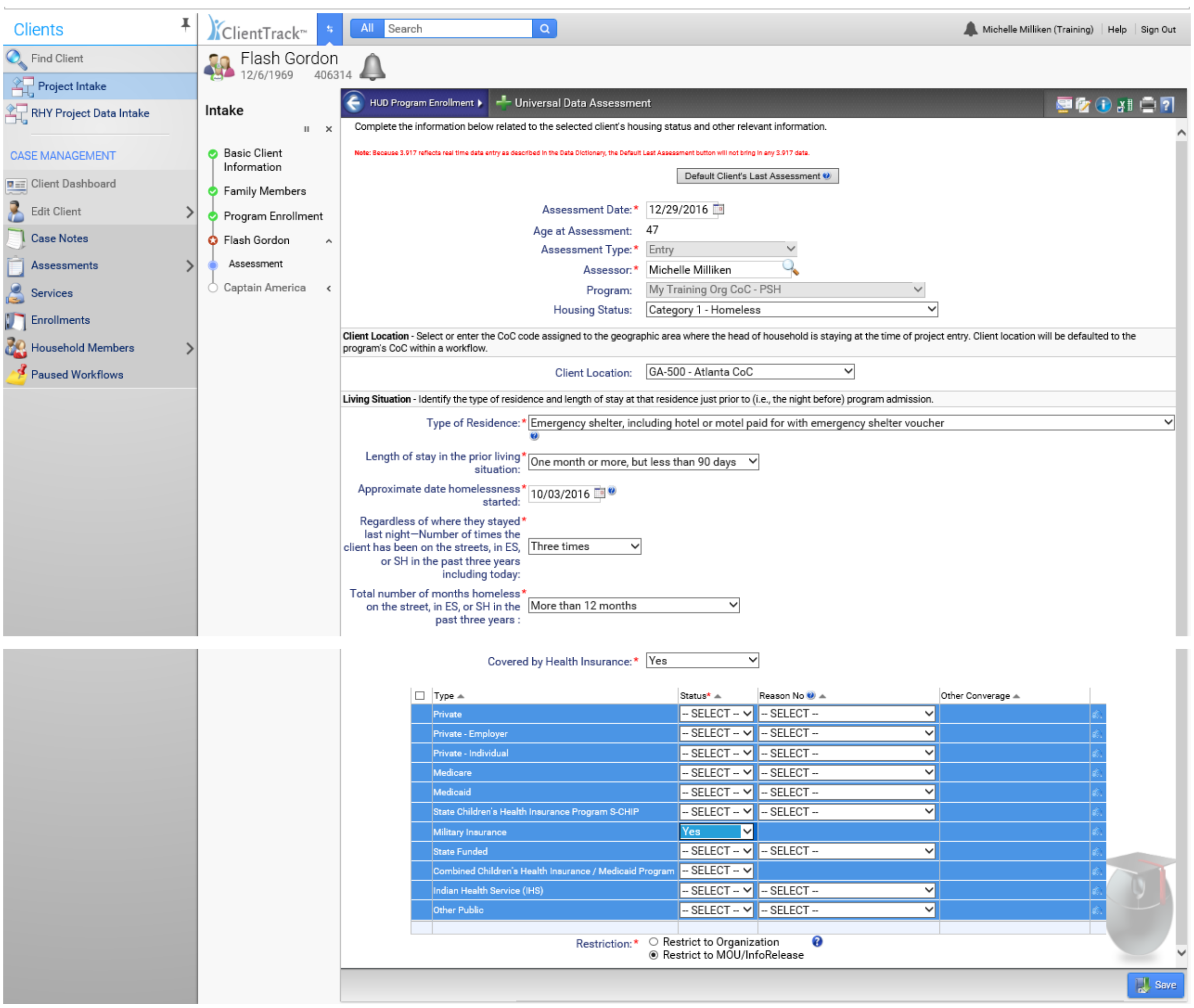


Remember to change the Enrollment Date if you are back dating the information. To ensure accurate data quality, enter all client data in a timely manner.

If you do not find your program option when enrolling a client, cancel the workflow by clicking the black "**X**" in the workflow screen found in the upper left-hand corner and please notify HMIS Staff immediately at **GAHMISsupport@dca.ga.gov**. Program information must be set up in the system before you can begin to enroll clients.

HMIS Universal Data Assessment

Complete all the required data fields indicated by an asterisk * and click **"Save"** to continue.



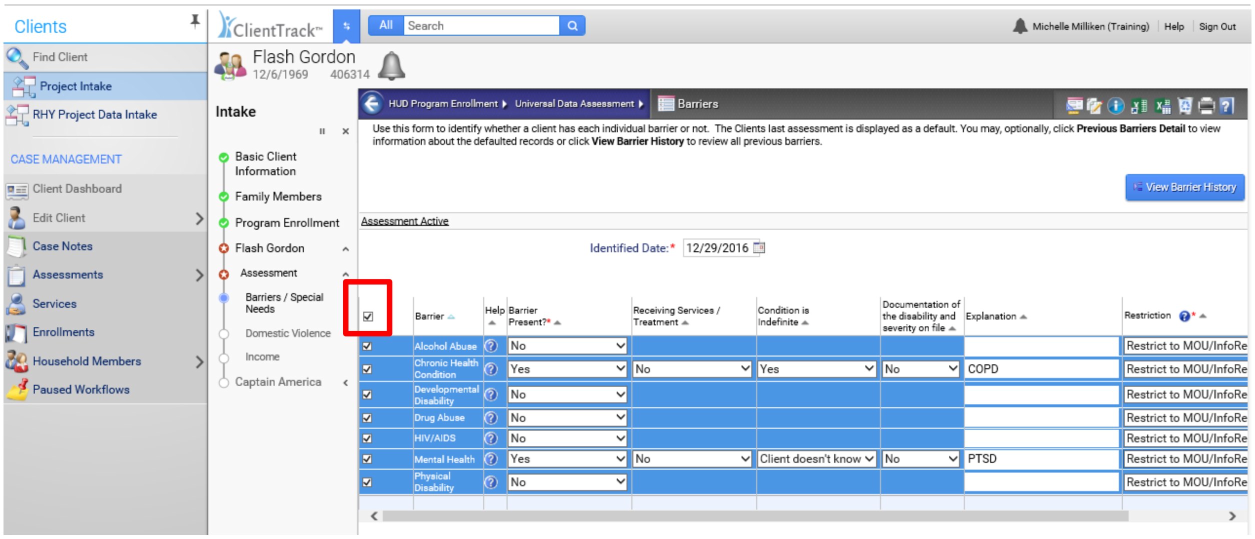
Definitions of Universal Data Requirements

- **Assessment Date** – Date the assessment was completed with the client (field will auto-fill with the Project Entry Date).
- **Housing Status** – Choose the appropriate category for the housing status of the household. This is based on the household's housing condition just prior to project entry. More extensive definitions can be found by clicking on the blue information circle located in the upper right-hand of the screen beside the printer icon.
- **Living Situation –** Data in this section are used along with disabling condition to determine whether or not a client is chronically homeless. ***HUD strongly encourages HMIS users to just ask the client for the information and record the client's answer. Attempting to tie each individual response with definitions or documentation requirement is not the attempt of this question.***
- Depending on the project to which you are enrolling a client and the Living Situation of the Client, you will have different questions that are required to be answered. For a more detailed explanation of the options, please refer to pages 26-35 of the latest version of the HMIS Data Standards.

  file:///C:/Users/Michelle/AppData/Local/Microsoft/Windows/INetCache/IE/WTT1CBYK/HMIS-Data-Standards-Manual.pdf
- **Health Insurance Assessment** – Complete the required information pertaining to the client's insurance status. If a client's health insurance status has changed, change the status of the type of insurance to "No" and then add an end date. Then you can change the Health Insurance status to "No" and click "Save" to continue. Start and End Dates are not required.

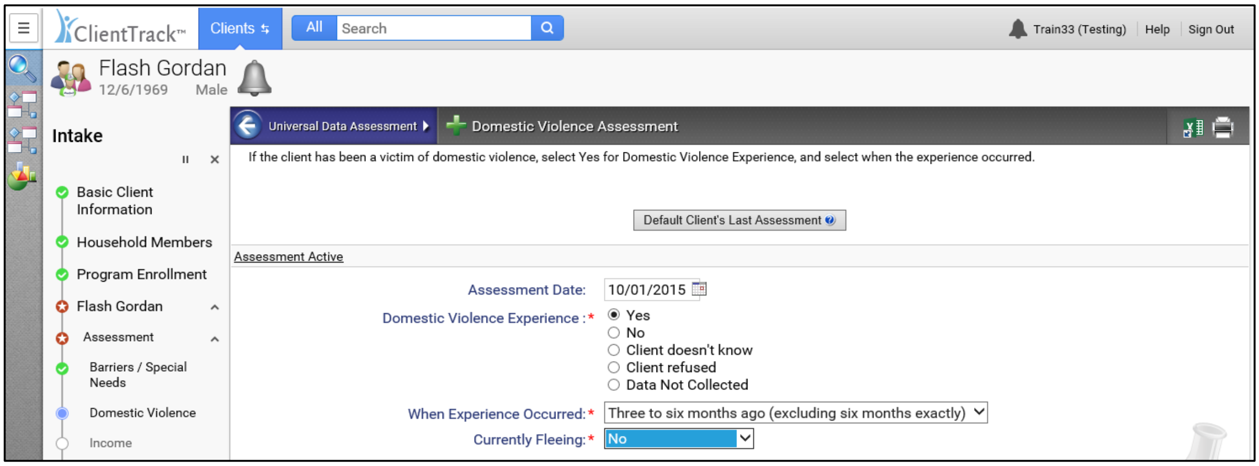
HMIS Barriers Assessment

The system defaults **"No"** for all barriers when you select the empty box in the upper left of the list of Barriers. To select a barrier, click on the drop down box for **"Barrier Present"** and change the status to **"Yes."** Complete any required fields that appear after selecting that specific barrier. It is important to keep in mind that clients must have at least one barrier to be eligible for some projects (such as Permanent Supportive Housing). If **no barriers** are present at enrollment, select all barriers and leave the **"Barrier Present"** status as **"No"** and click **"Save & Close."**



Domestic Violence Assessment

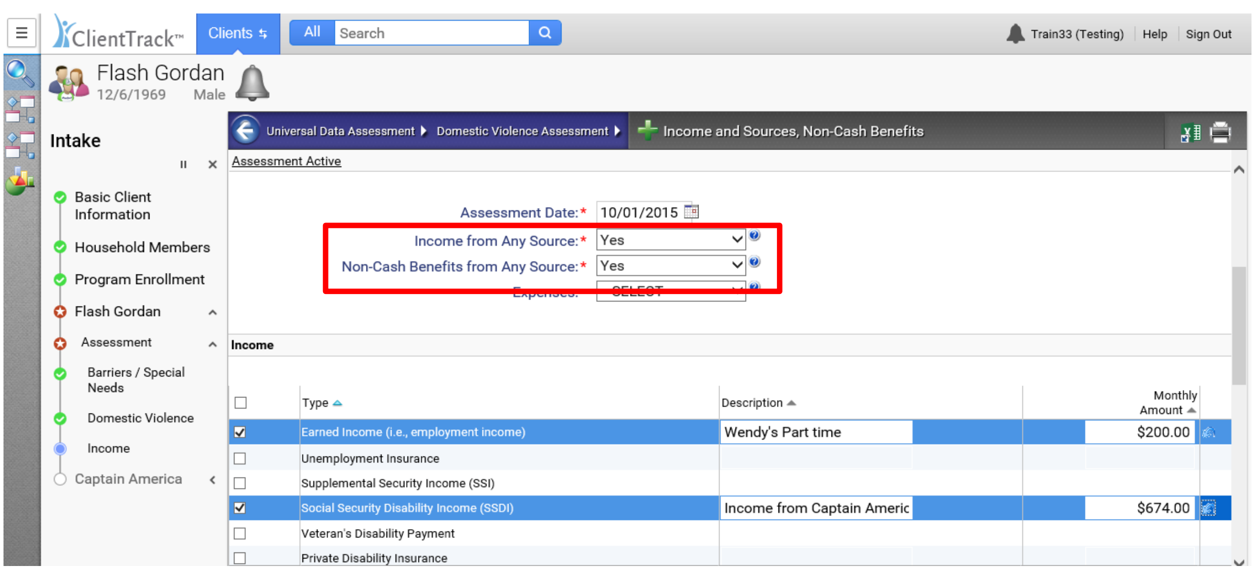
Complete the required information for the Domestic Violence Assessment. Please note that if domestic violence is reported and you select **"Yes"** for **"Domestic Violence Experience,"** you will be prompted for more information. If the client reports no domestic violence, then click **"Save"** to continue through the workflow.



Financial Assessment

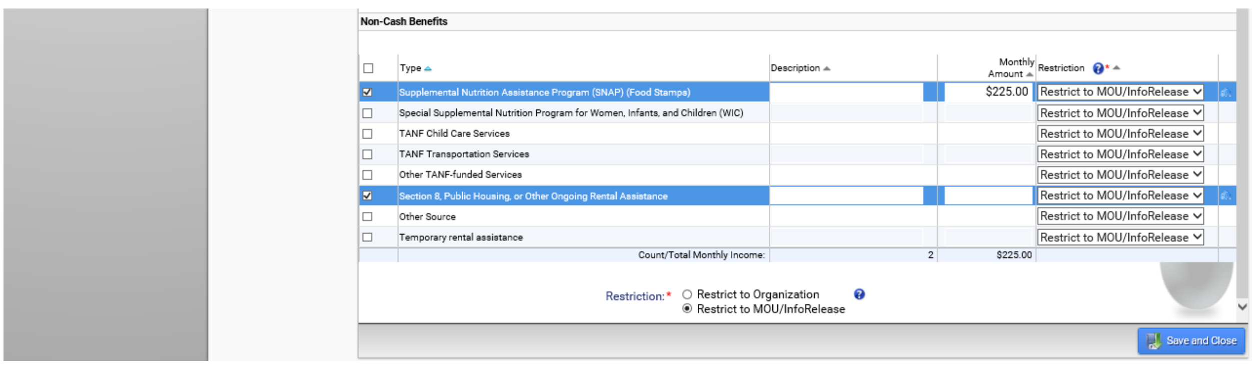
Complete the status for **"Income from Any Source"** and **"Non-Cash Benefits from Any Source"** with the provided drop down lists. If the status for either of these financial sources is **"Yes,"** you will be prompted to provide more information on the **"Type"** (definitions below) of income/benefit and the **amount *(monthly amount)*** with the list that appears below the status after selecting **"Yes."** Please note that Non-Cash Benefits will appear below Income and you will need to scroll down to input that information.

Also input any income a child may receive (i.e., SSDI) on the head of household's income/benefits information. You will not complete a separate Financial Assessment for children in the household.



Definitions of Sources of Income

- **Earned Income –** Employment income
- **Private Disability Insurance –** Income received from private disability insurance
- **Unemployment Insurance –** Unemployment benefits from the State
- **Worker's Compensation** – Income for an individual who has been injured on the job
- **Other Pension** – Income from a private employer or military retirement pay
- **Supplemental Security Income –** A federal project providing additional income for older and disabled individuals with little to no income stream
- **Social Security Disability Income** – A monthly compensation to individuals who can no longer work due to their medical conditions
- **Retirement (Social Security)** – Income payment provided by government for individuals who qualify
- **Alimony** – Income received for spousal/partner support
- **Veteran Disability –** A benefit paid to a veteran because of injuries or diseases that happened while on active duty or were made worse by active duty
- **Veteran's Pension** – Needs based pension provided by the VA
- **TANF** –Temporary Assistance for Needy Families
- **Child Support –** Income received from one parent to another to care for children
- **Other Income –** Any income not previously listed

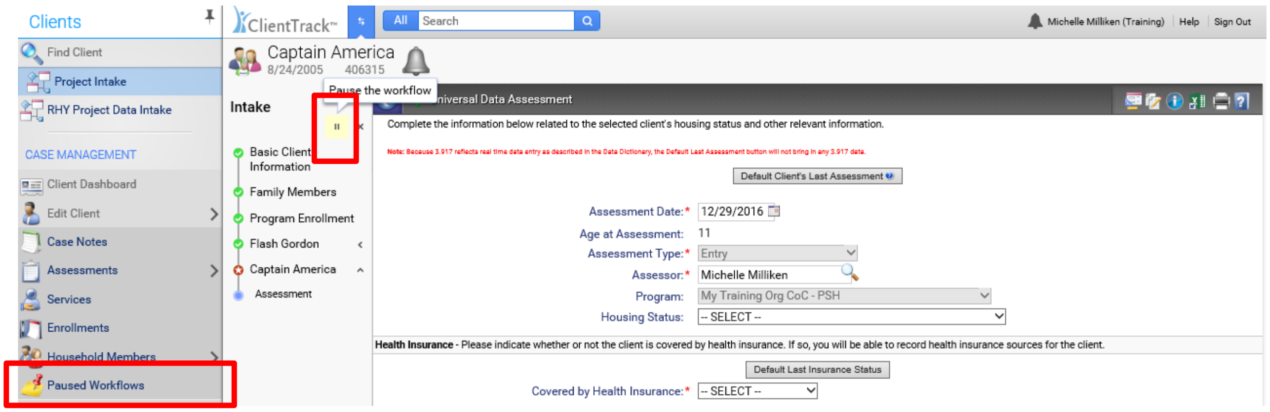


Definitions of Non-Cash Benefits (Specific Amounts are not Required Except for SNAP)

- **Food Stamps/Money for Food on Benefits Card** – Monthly payments issued by the government to persons with low income that can be redeemed for food at certain stores.
- **Special Supplemental Nutrition Project for Women, Infants and Children (WIC)** – A project geared toward supplying nutritional food for at risk pregnant women and their families.
- **TANF Child Care Services** – Child care funding assistance
- **TANF Transportation Services** – Transportation funding assistance
- **Other TANF Funded Services**
- **Section 8, Public Housing or Other Ongoing Rental Assistance (PSH)** – Low- and moderate-income housing subsidized by the federal Department of Housing and Urban Development (an amount is not required)
- **Temporary Rental Assistance (RRH)** – ESG rental assistance or transitional (an amount is not required)
- **Other Source –** Any source not previously listed above.

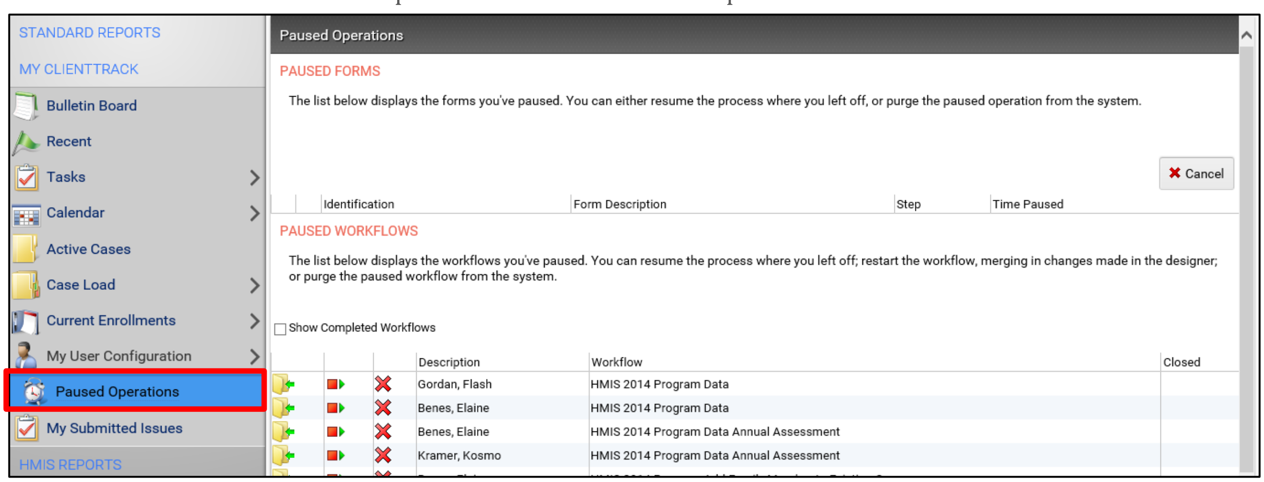
Pausing a Workflow

Please pay special attention to the process/workflow you are completing. Should you be interrupted during the workflow process, you may **"Pause"** a workflow by clicking on the pause button located in upper right-hand corner of the workflow menu beside the black **"X"** (as seen above in the red box). The black **"X"** will cancel the workflow. The pause feature will allow you to pause the workflow at any time so you can return to it later.



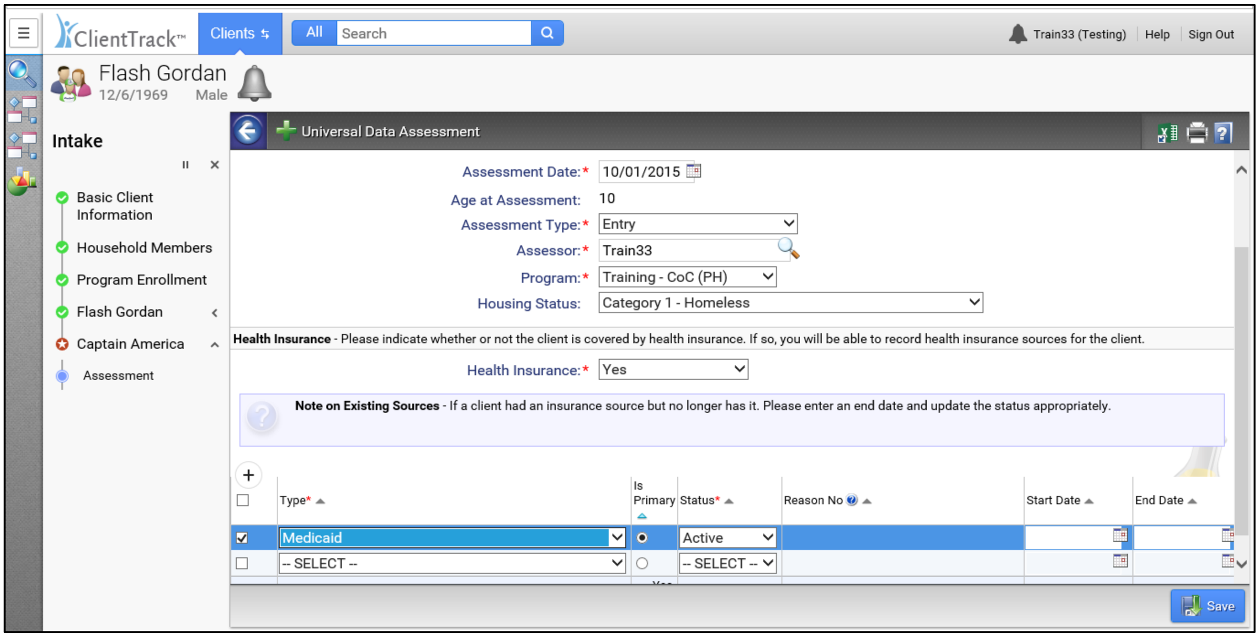
To **resume a paused workflow**, click on **"Paused Workflows"** at the bottom of the list of case management tools located on the left-hand side of the client record. Then click on the blue play button beside your paused workflow to select **"Resume"** in the drop down. This will take you to where you paused the workflow and you can finish your project enrollment.

You can also find a list of Paused Operations in the Home Workspace.



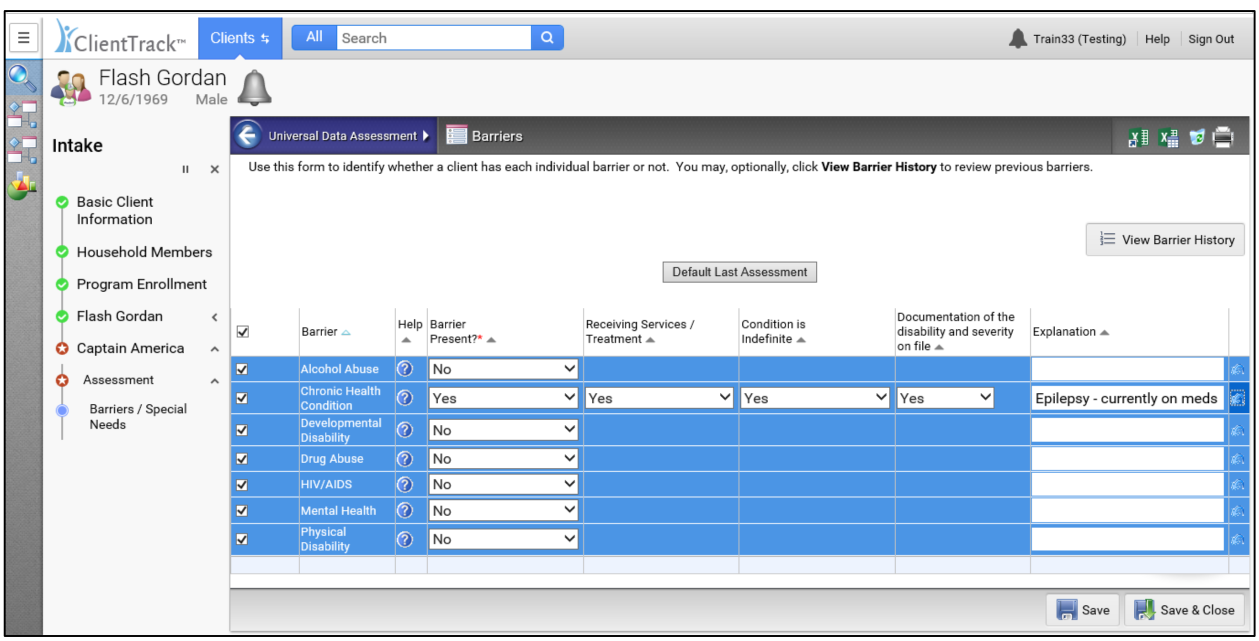
HMIS Universal Data Assessment for Child

Complete the required data elements for the child on the HMIS Universal Data Assessment. You will notice that the child's assessment does not require as much information as the adult's assessment. Click **"Save"** when finished with the assessment to continue in the workflow.

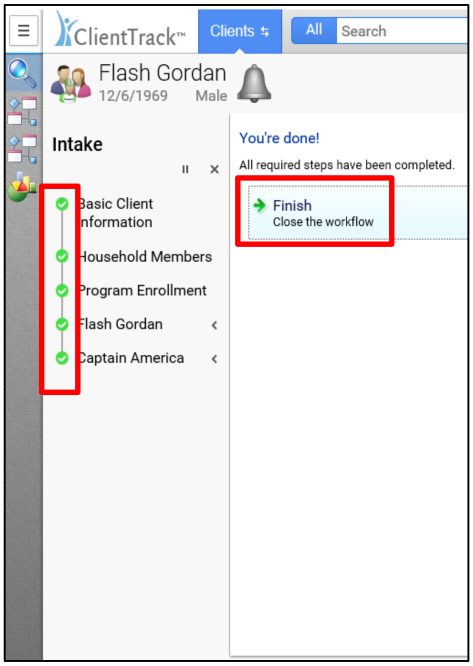


HMIS Barriers Assessment for Child

Complete any barrier information for the child you are enrolling. If **no barriers** are present at enrollment, select all of the barriers and leave the **"Barriers Present"** status as **"No"** and click **"Save & Close."**



Completing the Intake Workflow

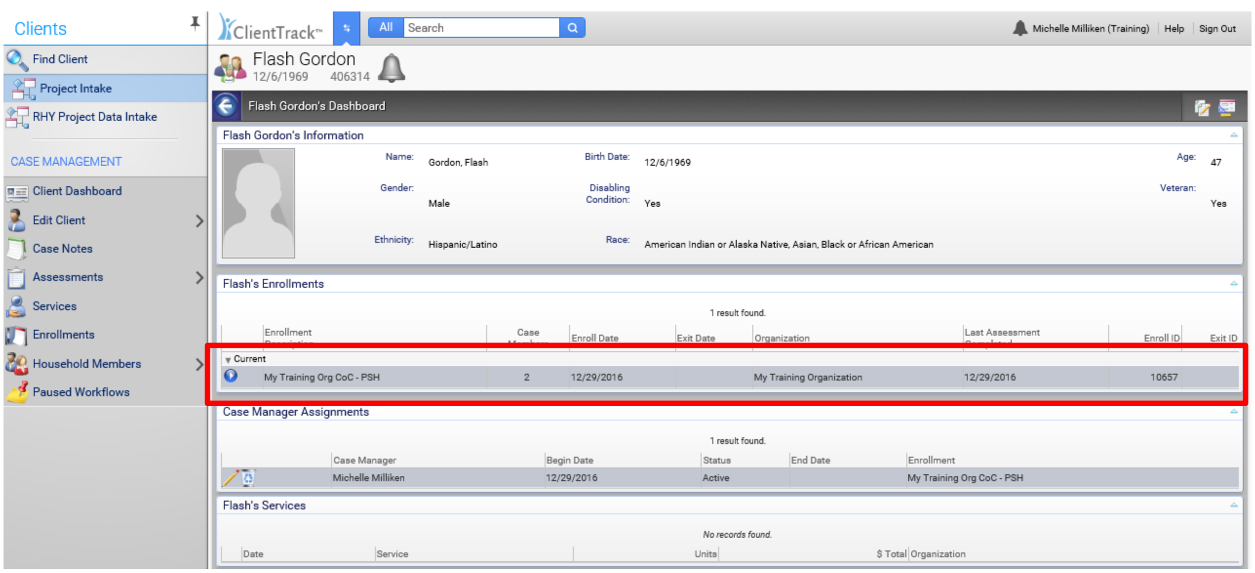


Once you have completed the required entry assessments for your client and household members, you will be prompted to **"Finish"** the workflow. If the workflow is complete then click **"Finish."** You will then be directed back to the head of household's client dashboard and you can see the new enrollment under **"Enrollments"** on the client record.

Notice that all workflow processes have been completed. Don't forget to click **"Finish".**

If you need to go back and change information entered in the workflow prior to finishing, you can click on the specific section of the workflow you wish to return to in the workflow window that appears on the left-hand side of the client record (outlined in red). Clicking on the link beside the green dot will take you to that specific section of the workflow where you can edit information.

You now have a completed enrollment.



Unique Project Requirements at Entry

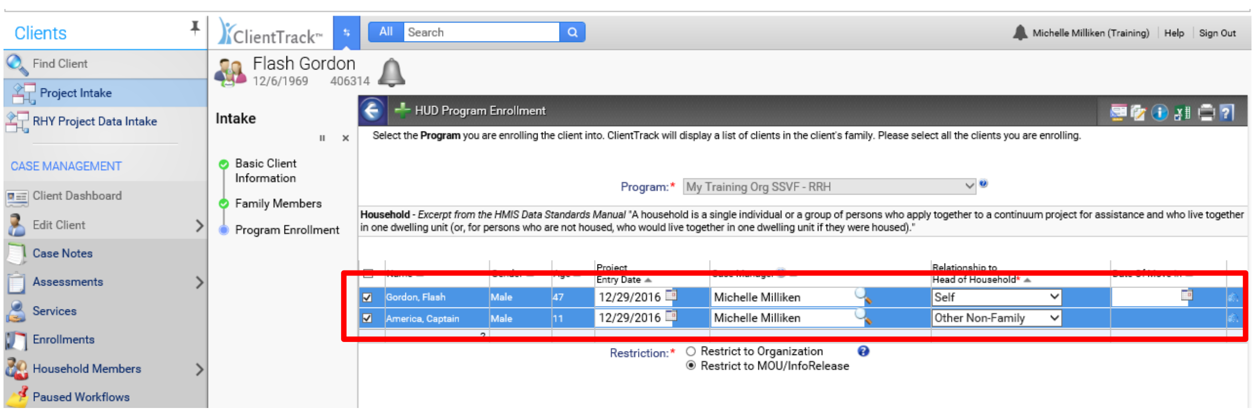
There are variations in data requirements for different project enrollments. In the following section are screenshots of project enrollments and their unique requirements during the Intake workflow for the following projects:

1. Rapid Rehousing (RRH)
2. Projects for Assistance in Transition from Homelessness (PATH)
3. Housing Opportunities for People with HIV/AIDS (HOPWA)
4. Runaway and Homeless Youth (RHY)

1. RAPID RE-HOUSING ENROLLMENT

In addition to the previous assessments outlined earlier in this manual, the RRH enrollment will require documentation of a client's **"Date of Move in"**, as seen below. All fields with an asterisk * are required fields.

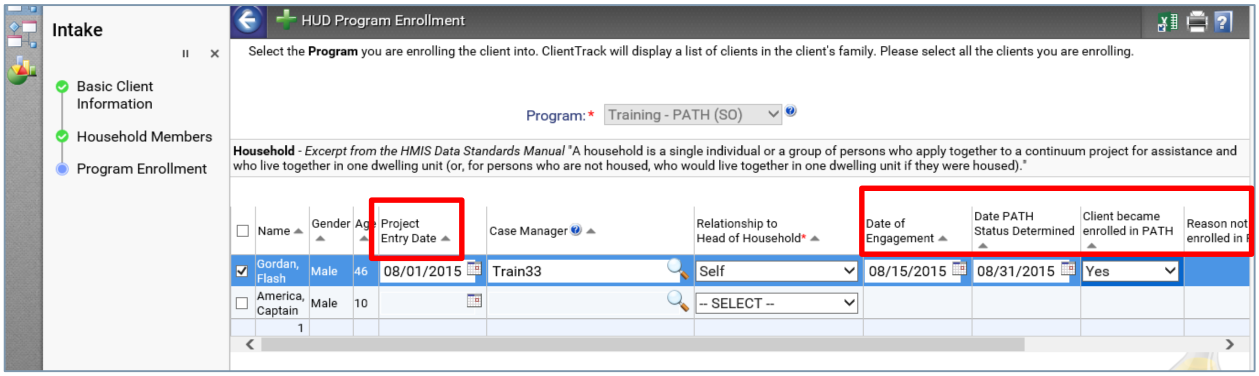
- **Project Entry Date** – Date client/household is enrolled into the RRH project.
- **Date of Move In** – When you complete an Update/Annual Assessment and are adding that the household is now in permanent housing, you will be required to add the Date of Move-In. You should use the date the **client actually takes occupancy** of the unit. The Date of Move In should not be projected or added as the date the lease is signed.



2. PROJECTS FOR ASSISTANCE IN TRANSITION FROM HOMELESSNESS (PATH) ENROLLMENT

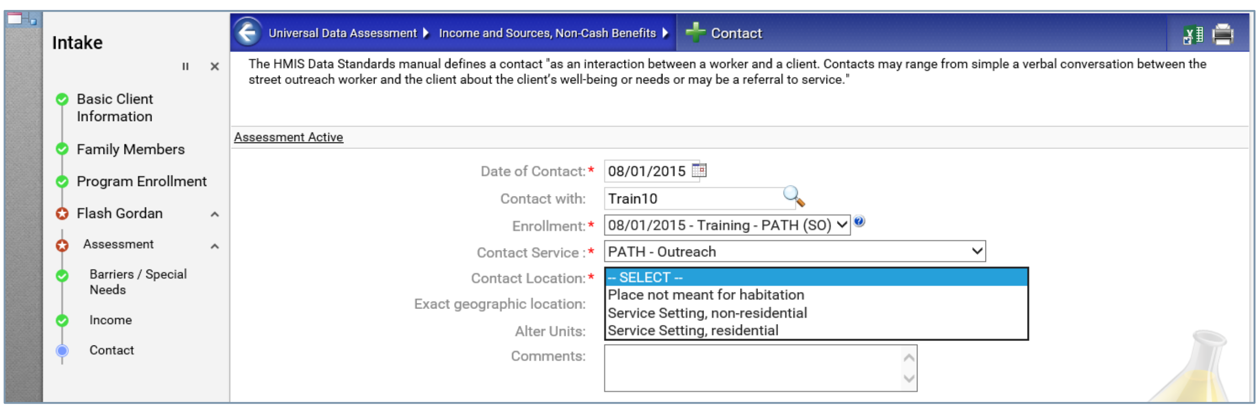
To manage your PATH project and clients in ClientTrack, be sure to log into the **"GA HMIS: Street Outreach"** workgroup. In addition to the entry assessments outlined earlier in this manual, the PATH project enrollment will require you to document:

- **Date of Engagement -** Date of Engagement is defined as the date on which an interactive client relationship results in a deliberate client assessment or beginning of a case plan.
- **Date PATH Status Determined** – Date client's enrollment in PATH is determined.
- **Client Became Enrolled in PATH -** A PATH enrollment occurs at the point when a client has formally consented to participate in services provided by the PATH project. This does not mean the time at which the client formally consents to services by a community mental health center.



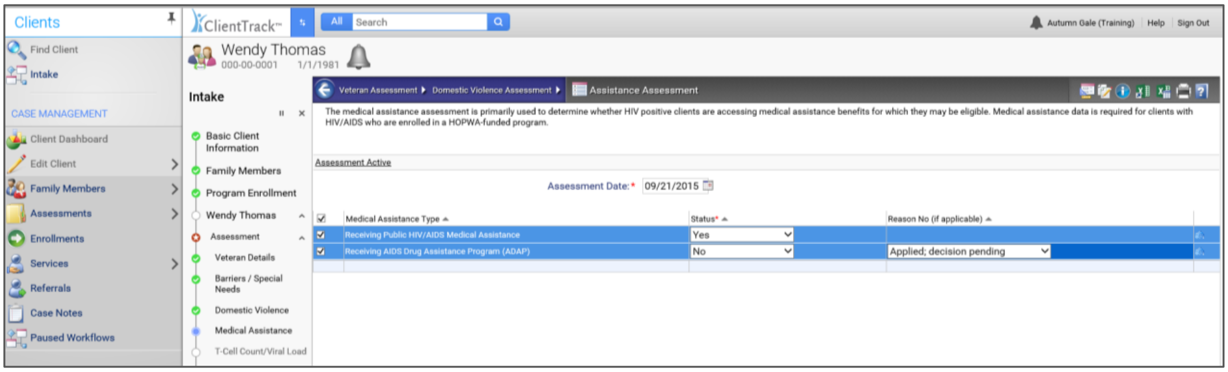
Before completing the Intake workflow, you will also be required to document your PATH contact information as seen below.

Date of Contact, Contact Service and **Contact Location** will also be required as seen below. Complete all of the required data fields to complete the PATH enrollment.

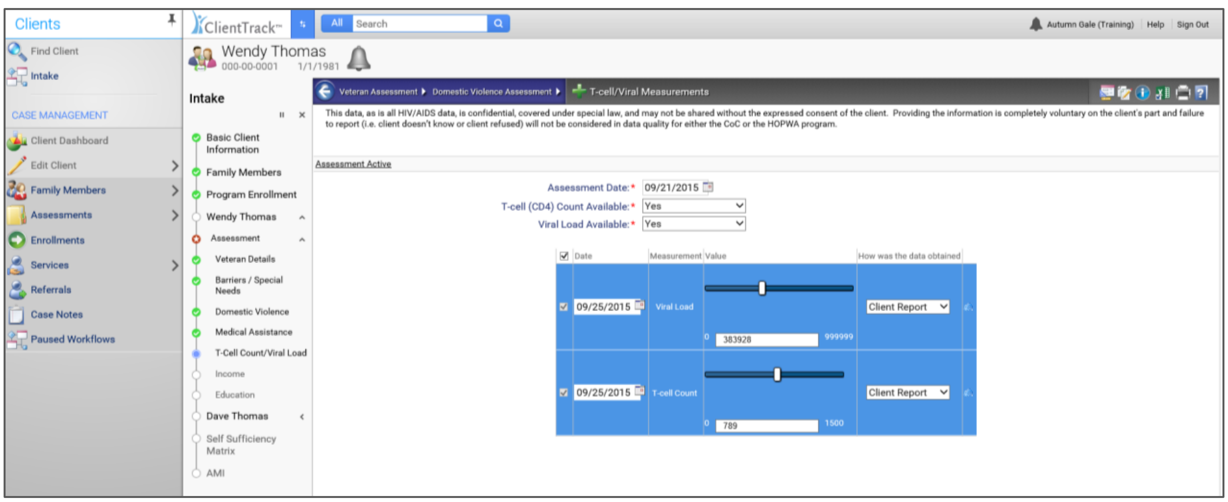


3. HOUSING OPPORTUNITIES FOR PERSONS WITH AIDS (HOPWA) ENROLLMENT

In addition to the entry assessments outlined earlier in this manual, for a HOPWA project enrollment a **"Medical Assistance Assessment"** and **"T-Cell Count/Viral Load Assessment"** are required to be completed for the client as seen below.



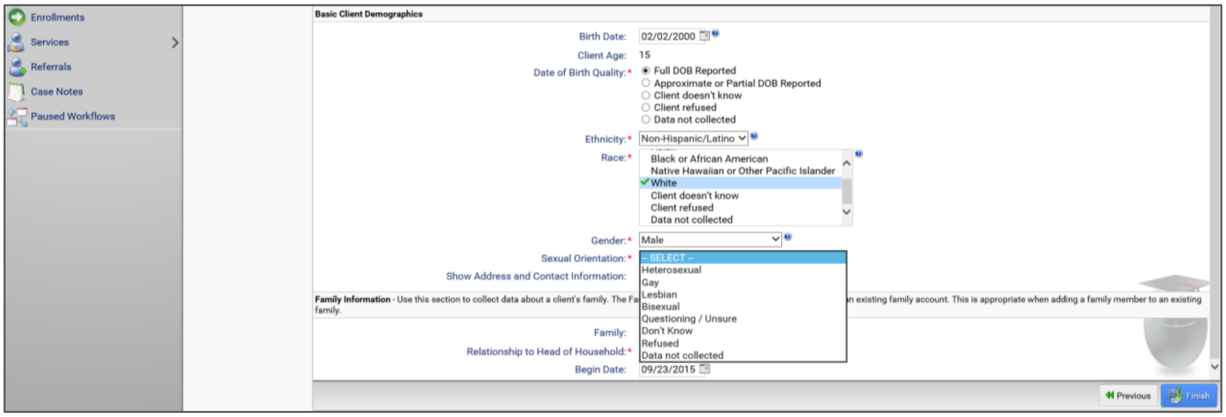
Use the drop down box to change the status of each field to **"Yes"** if the data is reported. After **"Yes"** is selected for **"T-cell (CD4) Count Available"** or **"Viral Load Available,"** additional fields will populate in the blue table below where the specific counts can be entered.



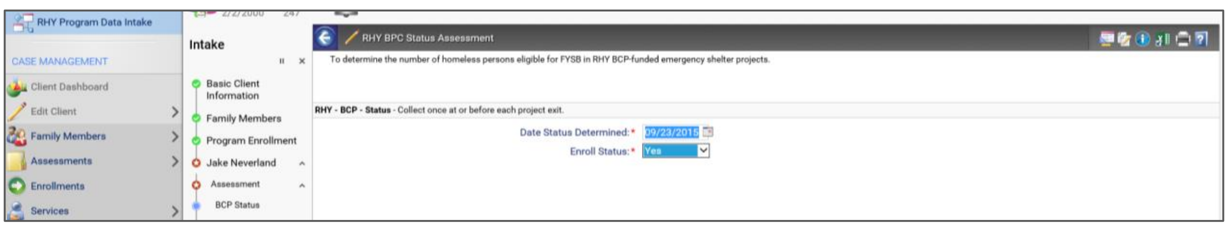
4. RUNAWAY & HOMELESS YOUTH (RHY) ENROLLMENT

HUD and SAMSHA require additional data collection for the Runaway & Homeless Youth (RHY) project in HMIS. When you begin the Intake Workflow for a new client, you will be prompted to complete **"Sexual Orientation"** on the client's basic information screen as seen below.

You will also complete the following assessments:

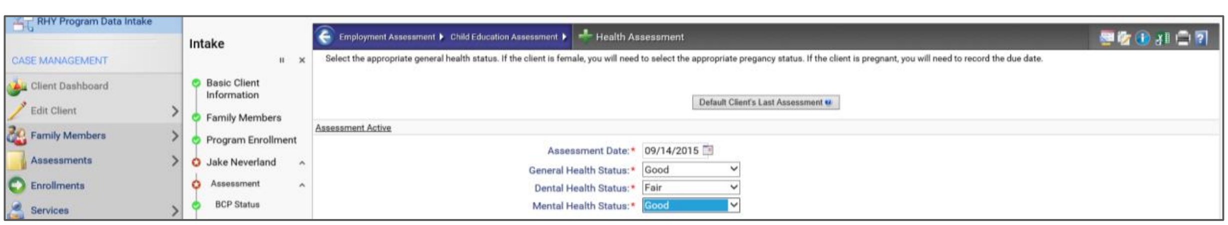


Basic Center Project (BCP) Enrollment Status Assessment – This is only required for emergency housing and prevention RHY projects. Complete the required data and click **"Save"** to continue.

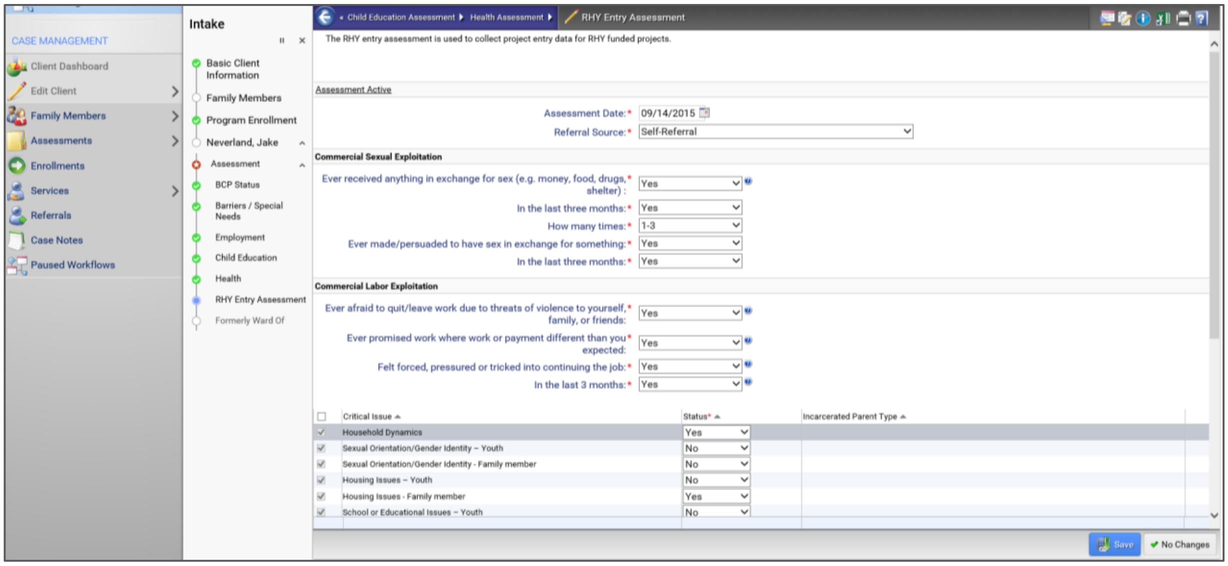


Employment Assessment – The built in logic will require additional information depending on the client's employment status. Click **"Save"** to continue.

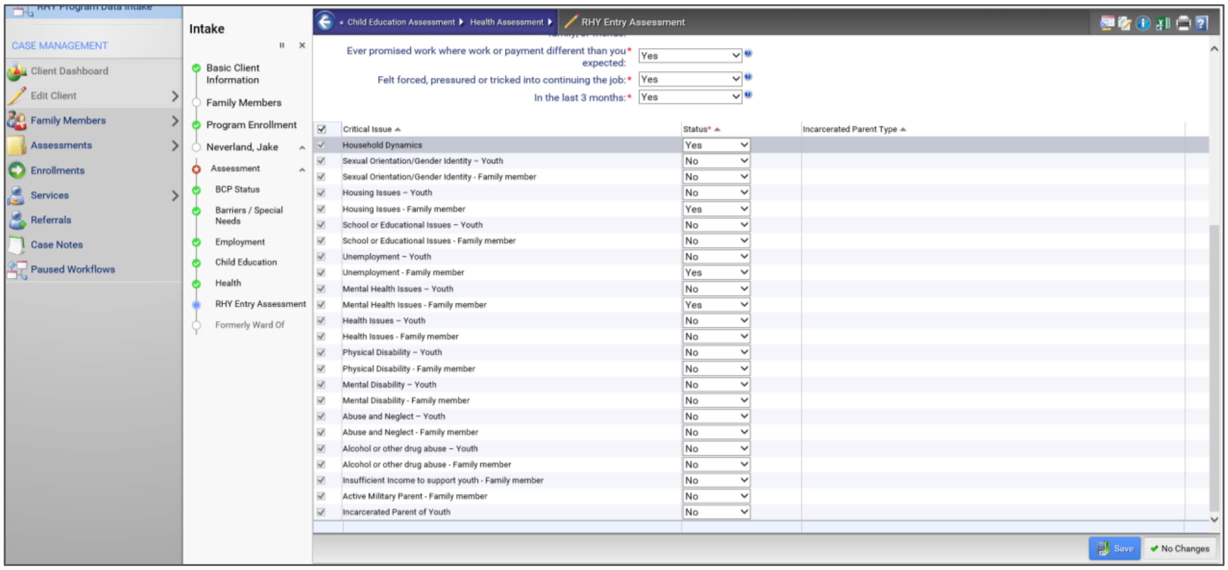
Health Assessment - Complete the required data and click **"Save"** to continue.



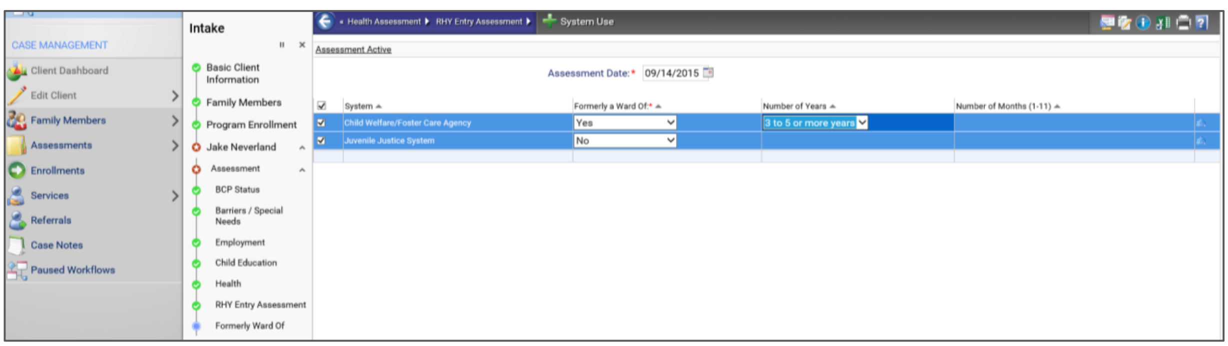
Commercial Sexual Exploitation and Commercial Labor Exploitation Assessments – These assessments are new requirements for the RHY project. Complete all the fields with a red asterisk (*) to continue in the workflow.



Critical Issue(s) Assessment – The built in logic may require additional data depending on the client's responses to the questions. To move forward on this assessment, click all of the **"Critical Issues"** and change the default **"Status"** to **"Yes"** for those the client reports as critical issues. Click **"Save"** to continue the workflow.

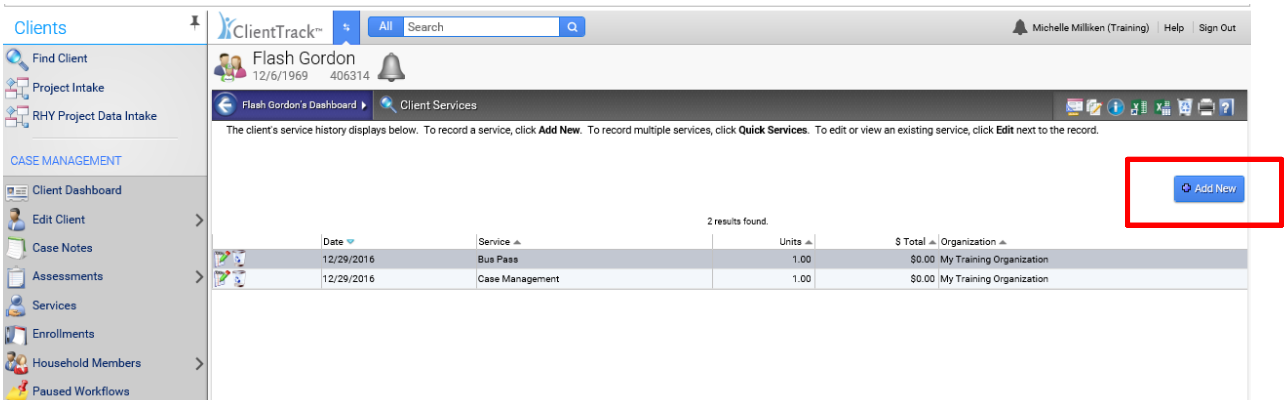


Formerly Ward Of Assessment – Complete all of the required data to move forward in the workflow. Be sure to check both **"Systems"** and change the default status of **"Formerly Ward Of"** to **"Yes"** if the client reports being a ward of that system. Click **"Save"** to continue.

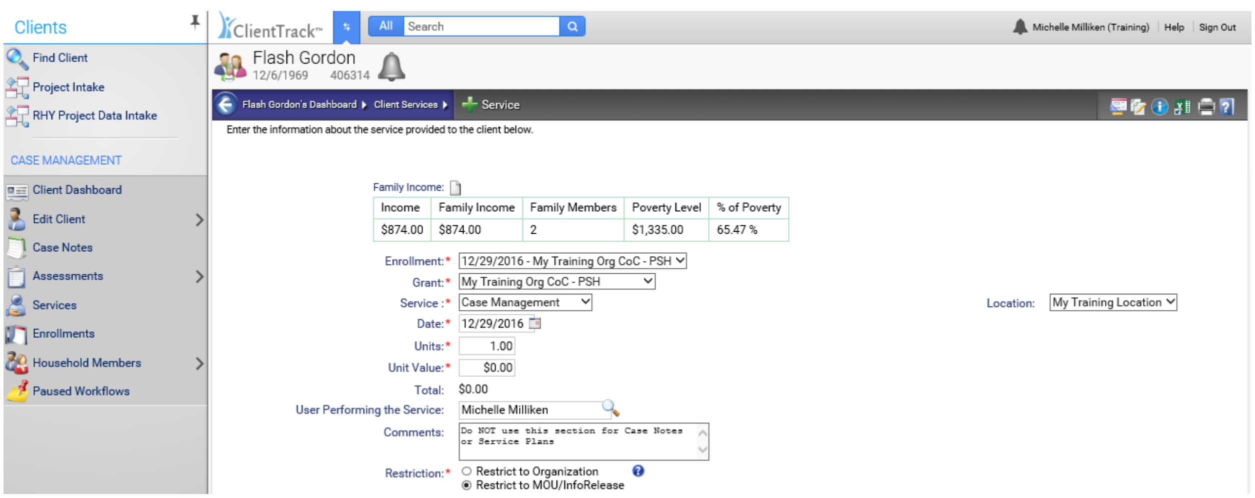


ADDING SERVICES

Currently, HOPWA, RRH, RHY and PATH projects are required to enter services into the HMIS. If you operate a HOPWA, RRH, RHY or PATH project, after completing an enrollment for a client, you can document services associated with the project enrollment with the "**Services**" link located in the list of case management tools on the left-hand side of the client record. This will open the Services window where you can "**Add New**" services or manage current services.



To document a new service, click on **"Add New."** You will see the Services home screen where you select the enrollment associated with the service and the service provided. You can also enter units (1.00 unit = one hour of case management or a bus pass) to track costs. The comments section can be used for reminders; however, this is not the area to write case notes. Case Notes will be covered later in the manual. Please note that services can be tailored to your organization's needs. If a service does not appear in your agency's options, contact the help desk to request that it be added.

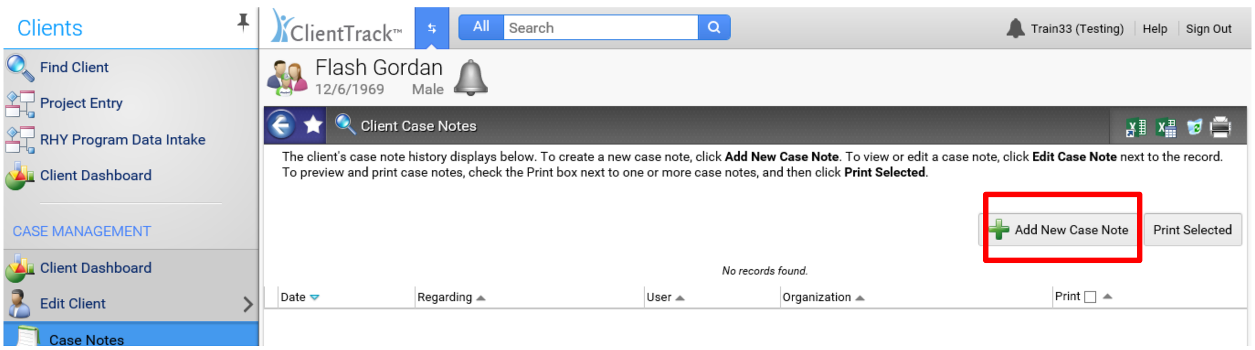


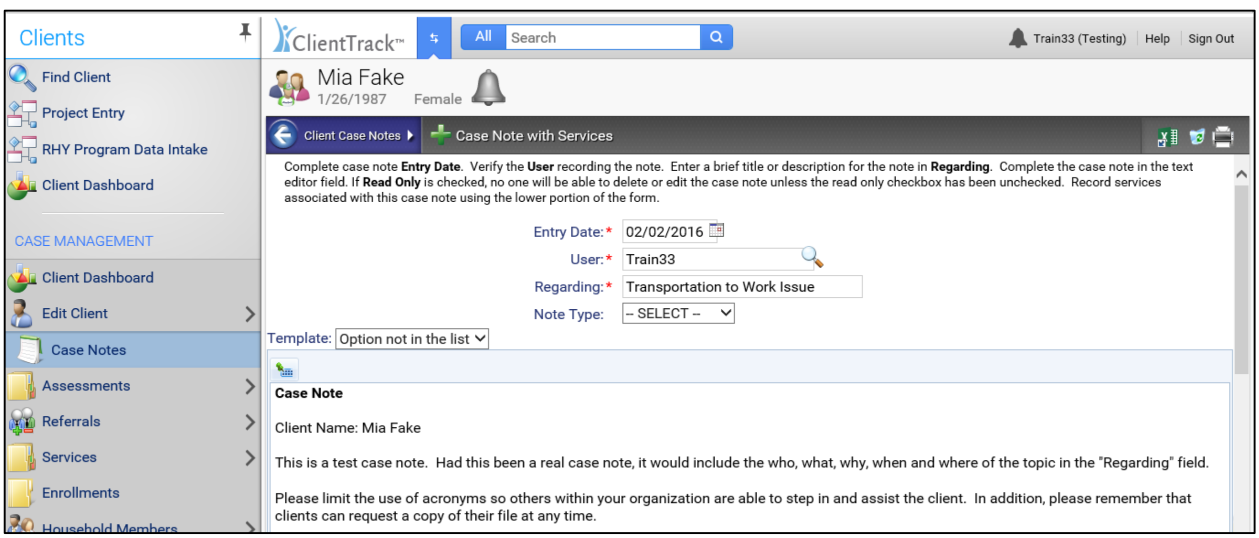
When you are finished documenting a service, click on the "**Save**" button and you will be taken back to the Services home screen where you can add another service, edit or delete a service you created.

CASE NOTES AND SERVICE PLANS

Timely and robust case notes assist you and other case managers at your organization in serving your clients. It is extremely important that meetings, calls and other relevant information regarding your client are properly documented in case notes.

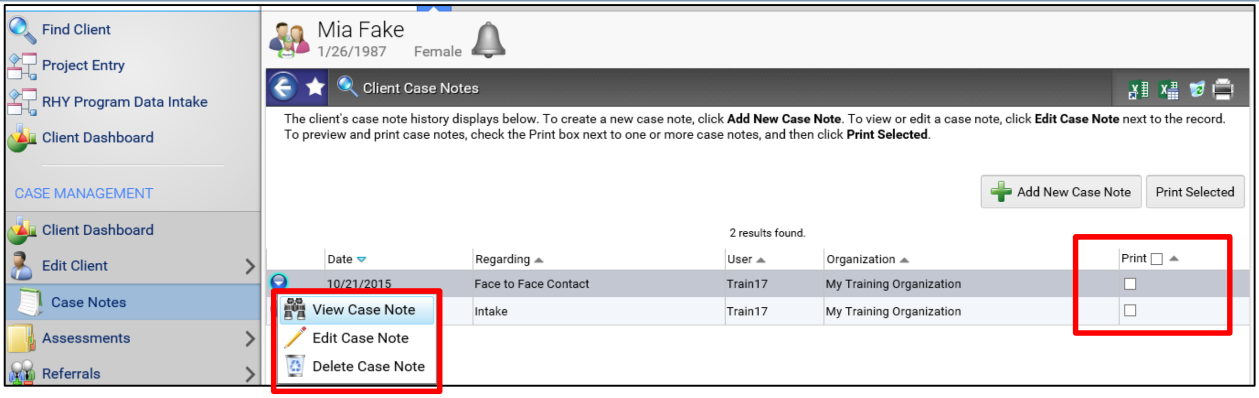
To add case notes, click on the "**Case Notes**" link in the list of case management tools on the left-hand side of the screen. Click on the "**Add New**" button on the upper right-hand side of the screen. ***Any case notes created for a client are restricted to case managers within your organization. No one outside of your agency can view your case notes.***





Once a case note is created, it will appear in a list of case notes on the Case Notes home screen. You can use the blue play button beside the case note to:

- View Case Note
- Edit Case Note
- Delete Case Note (A deleted case note can be restored by going to the Recycle Bin in the upper right hand corner of the screen.)



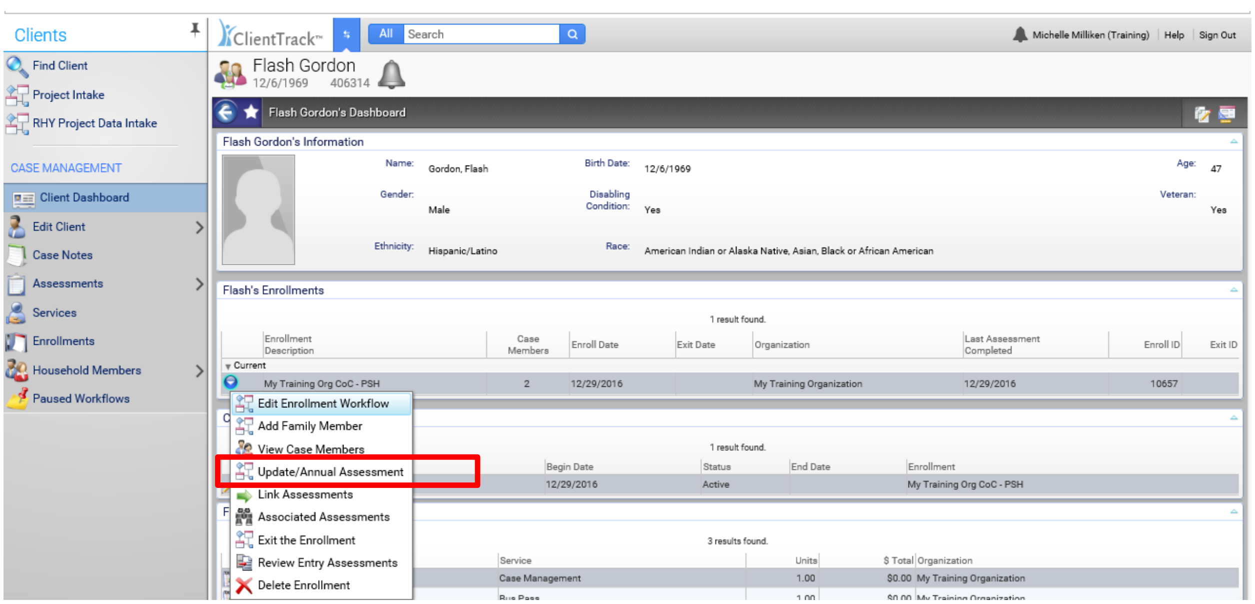
You can also select case notes to print by clicking on the **"Print"** box located in the far column and clicking on the **"Print Selected"** button beside the **"Add New"** button. This will print all of the "checked" case notes.

UPDATE/ANNUAL ASSESSMENT

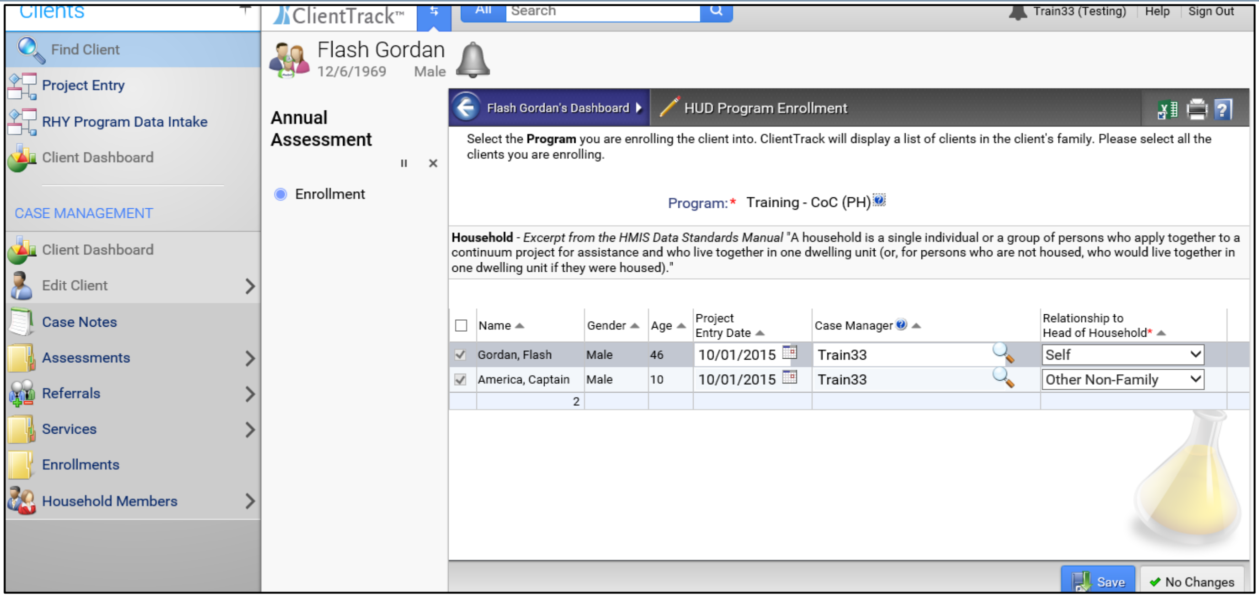
For clients who spend longer periods of time in your project or to document any changes in your client's status since entry, you should complete an **"Update/Annual Assessment"**. This assessment is required if clients are enrolled in your project for a year or longer, and some projects like RRH require more frequent assessments so be sure to check your project requirements for the Update/Annual Assessment.

The Update/Annual Assessment is also helpful for tracking significant changes to a household – for example a client gets a job and the income changes. For your convenience, the assessment has been developed as a workflow with the following steps:

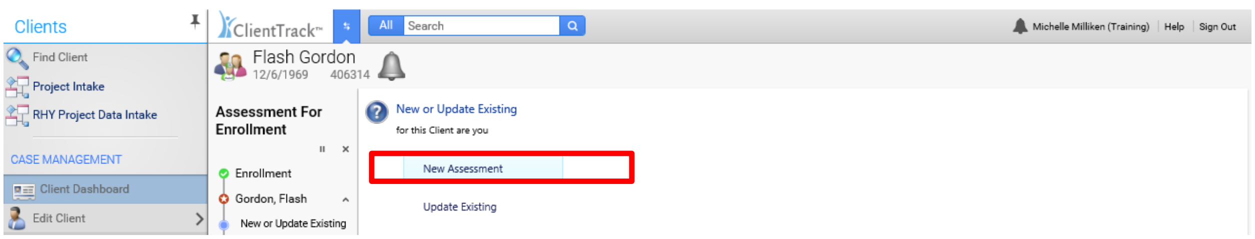
- Click on the blue play button beside your project enrollment;
- Select "Update/Annual Assessment" from the drop down list; and
- Complete the required assessments prompted by the workflow and save as you go.

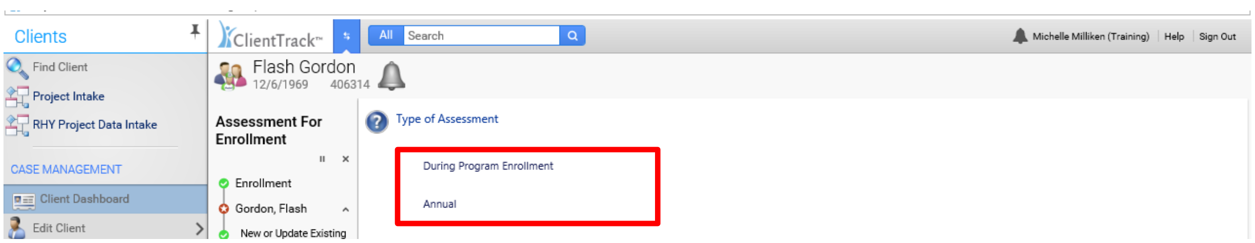


The first screen you will be taken to will review the household members and the enrollment. Click **"Save"** or **"No Changes"** in the bottom right-hand corner to continue in the workflow.



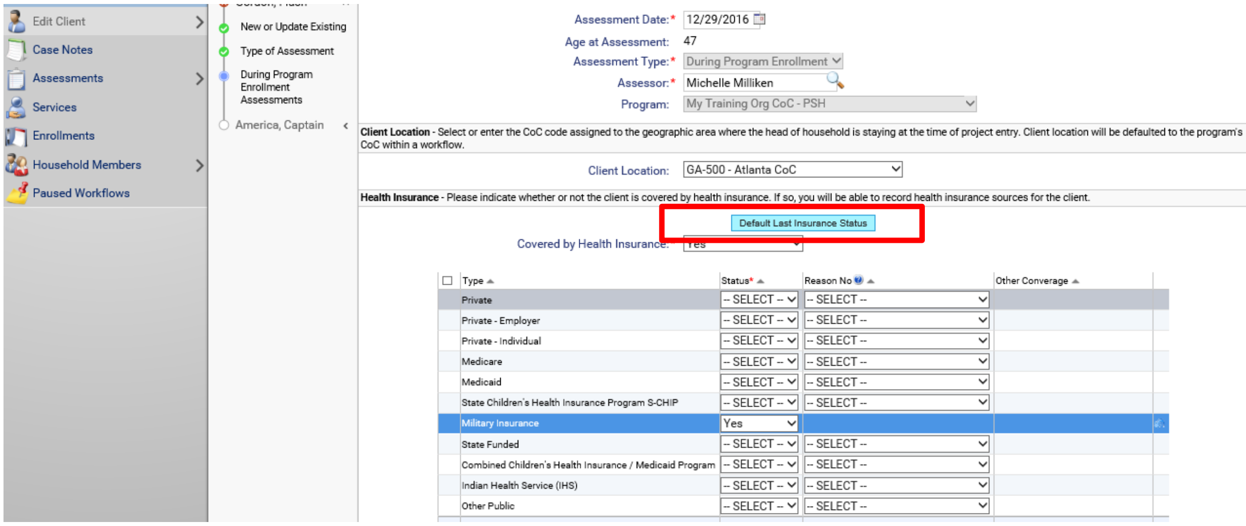
Select the option to complete a "New Assessment" and then select the appropriate Type of Assessment. For an Annual Assessment to be recognized on an Annual Performance Report it must be completed within 30 before or after the yearly anniversary of the client's enrollment.





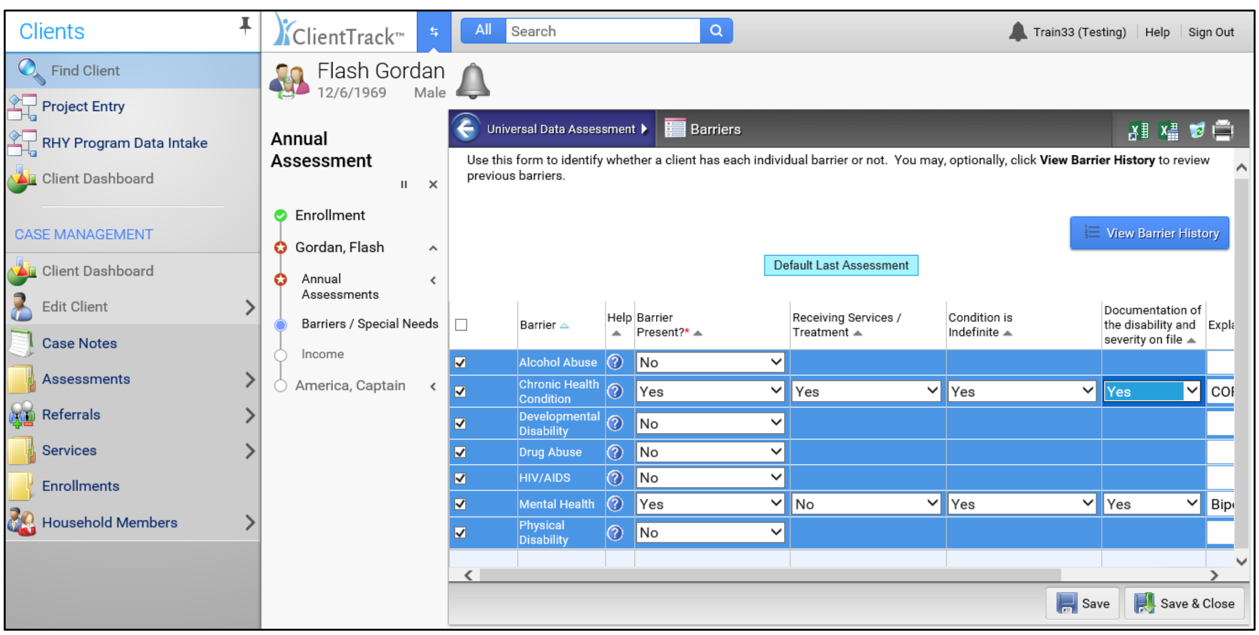
HMIS Universal Data Assessment

You will then review the head of household's Insurance information. You can use the Default Last Insurance Status and then review and confirm the information is still correct.



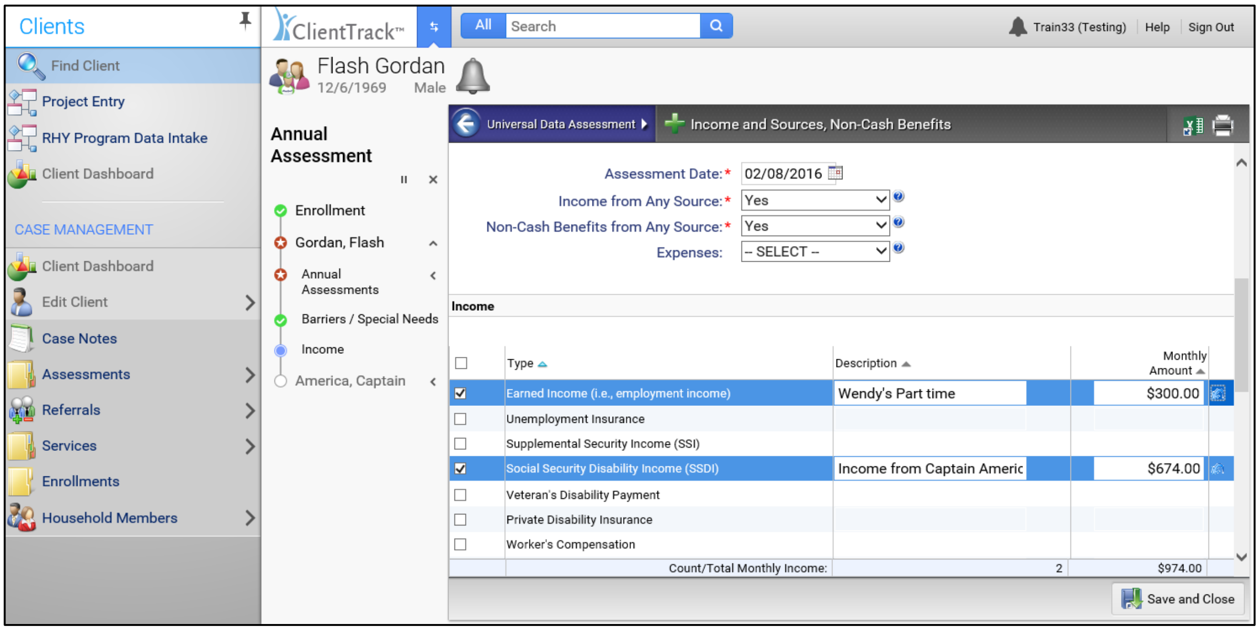
HMIS Barriers Assessment

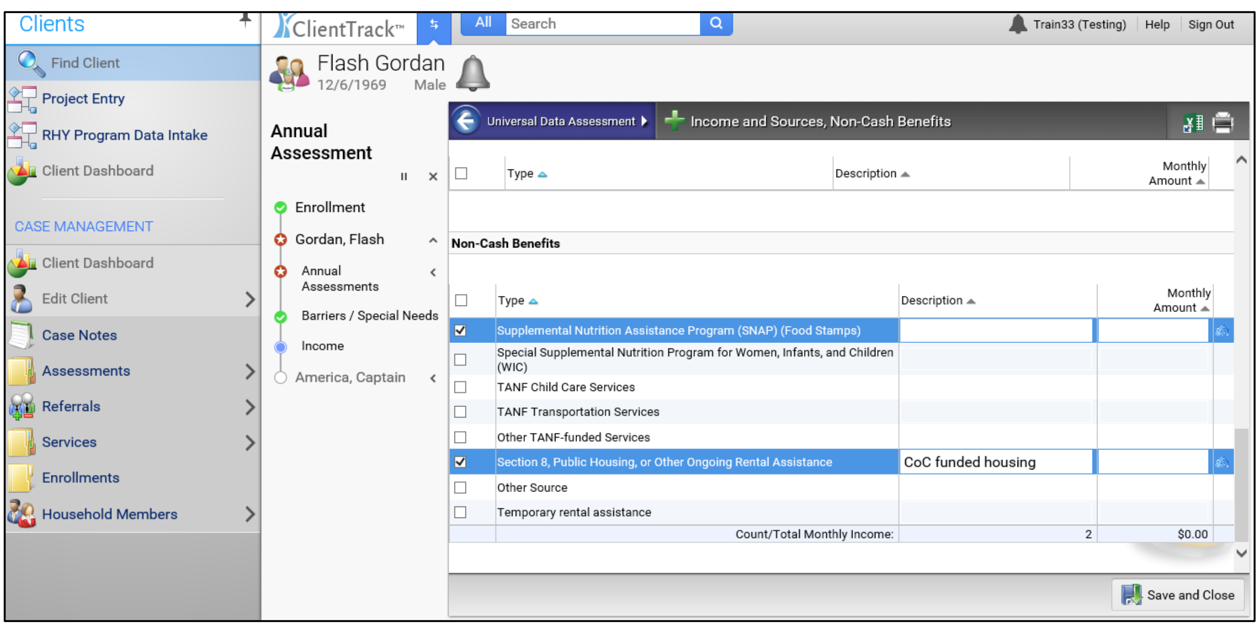
You can use the "**Default Last Assessment**" to populate the Barriers previously entered for the Client. Review the HMIS Barriers and make any changes necessary. Click **"Save & Close"** to move forward in the workflow.



Financial Assessment

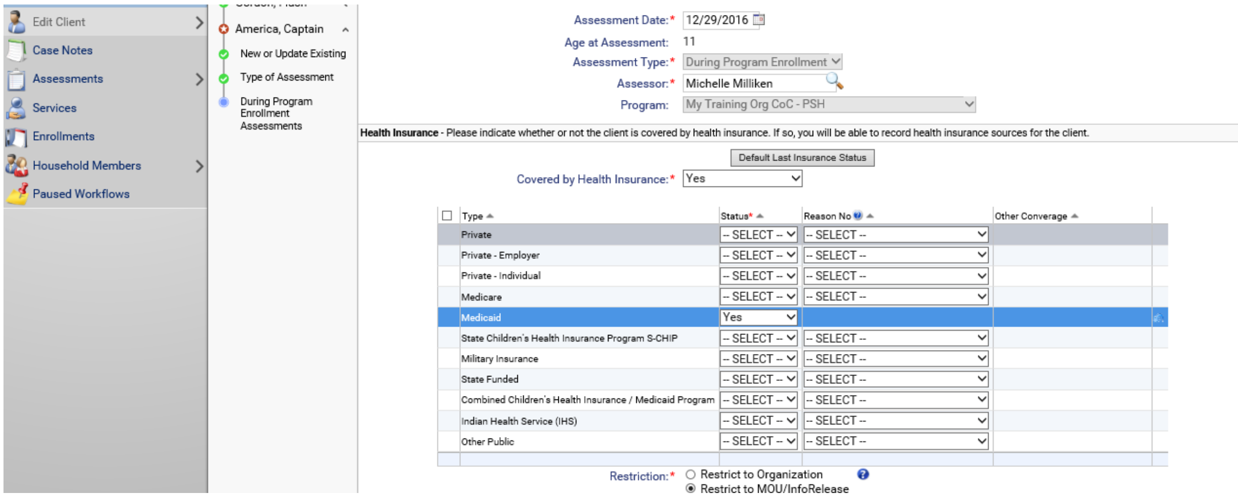
Review the Financial information for the head of household and document any changes to the household income. You can use the **"Default Last Assessment"** button to populate the information that was entered at entry or the latest Financial Assessment. Be sure to scroll down to complete Non-Cash Benefits and click **"Save and Close"** when finished. Again, when using the Default Last Assessment feature, you must verify and confirm the data used is still accurate.





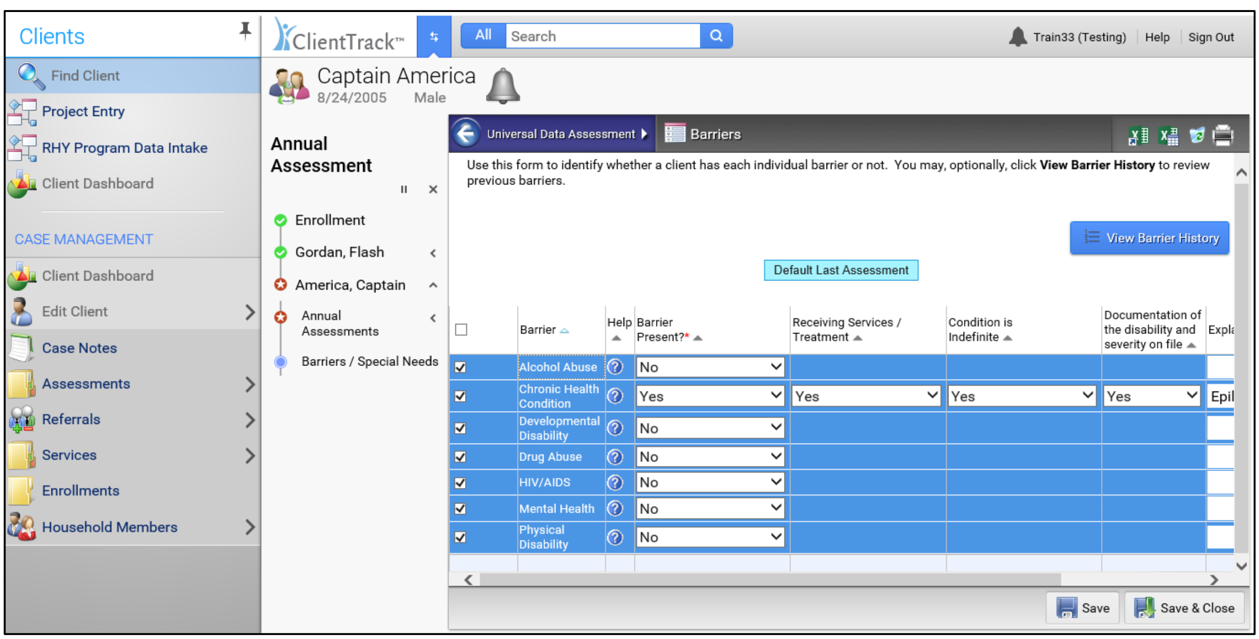
HMIS Universal Data Assessment for Child

After completing all of the updated assessments for the head of household, you will be prompted through the assessments for all enrolled household members. The adult assessments will look like the head of household's assessments. The Update/Annual Assessment will look differently for children.



HMIS Barriers Assessment for Child

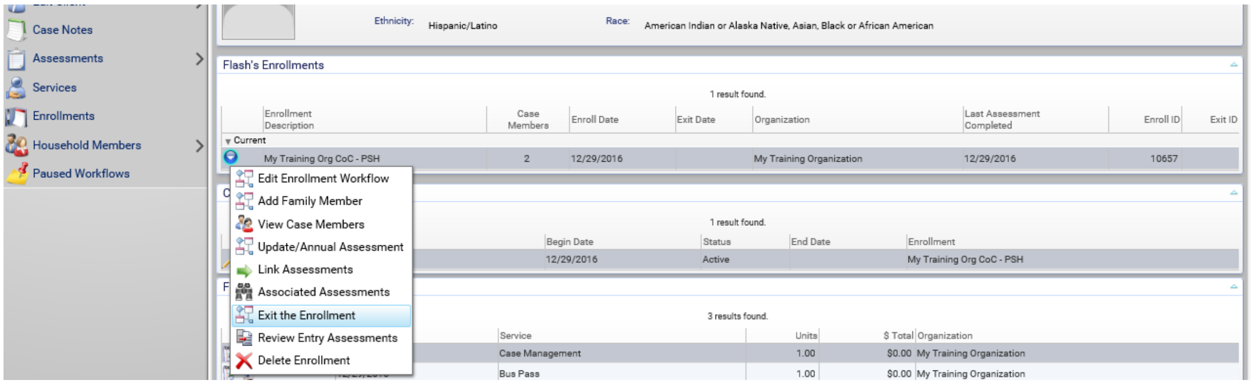
Complete the Barriers Assessment for the child. If no barriers are reported, click **"Save & Close"** to continue in the workflow.



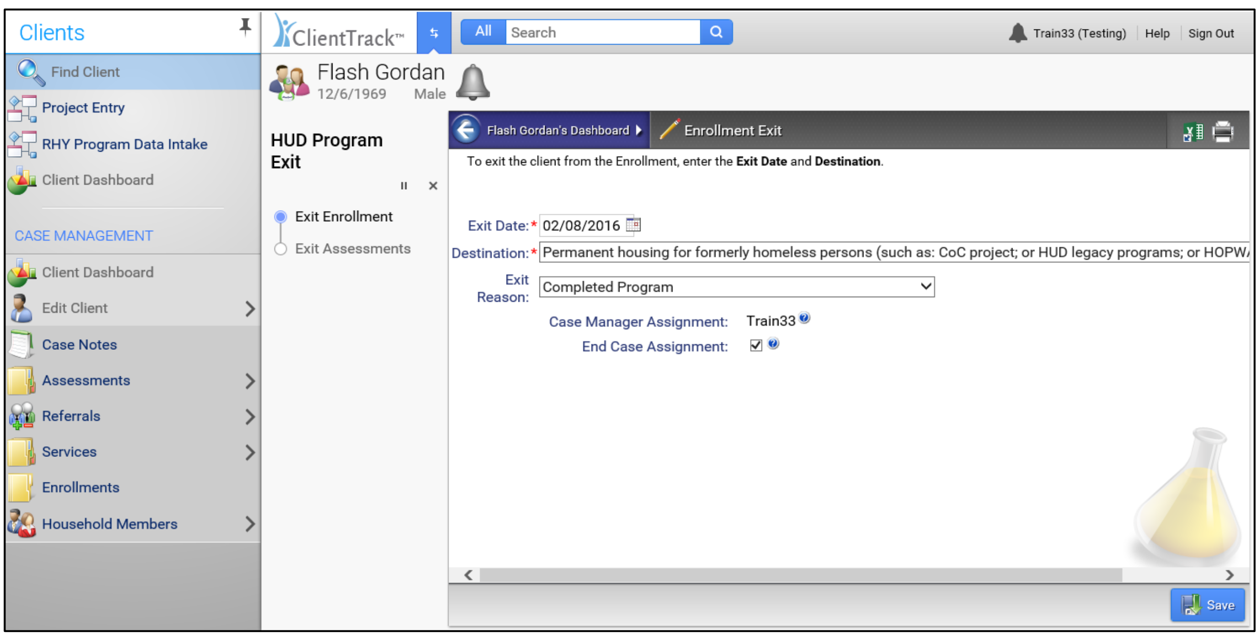
PROJECT DISCHARGE/EXIT

When a client has transitioned from your project or is no longer receiving services for any reason, you will discharge/exit the client from your project in ClientTrack with the following steps:

- Go to the client record;
- Click on the blue play button beside your project enrollment located in the center of the client record;
- Select **"Exit the Enrollment"** in the drop down list that appears after clicking on the blue play button; and
- Complete the information prompted through the Exit workflow and save as you go.

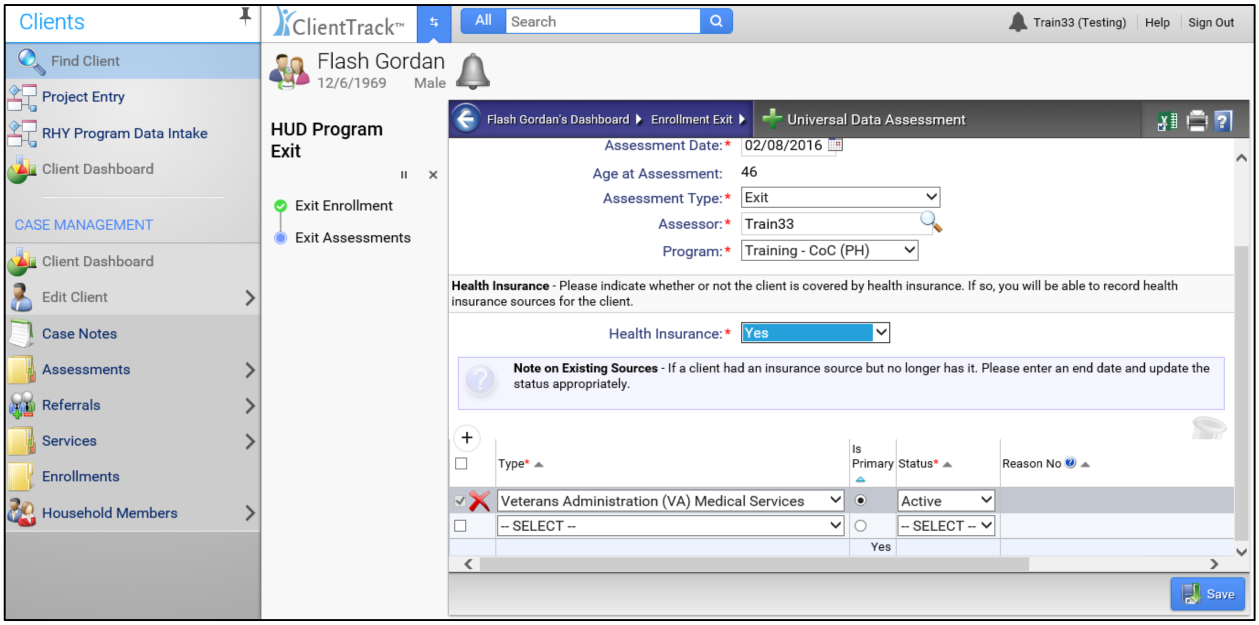


On the first screen of the exit workflow, you will be asked for the **"Exit Date," "Destination," "Exit Reason,"** and whether to **"End Case Assignment."** Please note that all fields with an asterisk * are required.



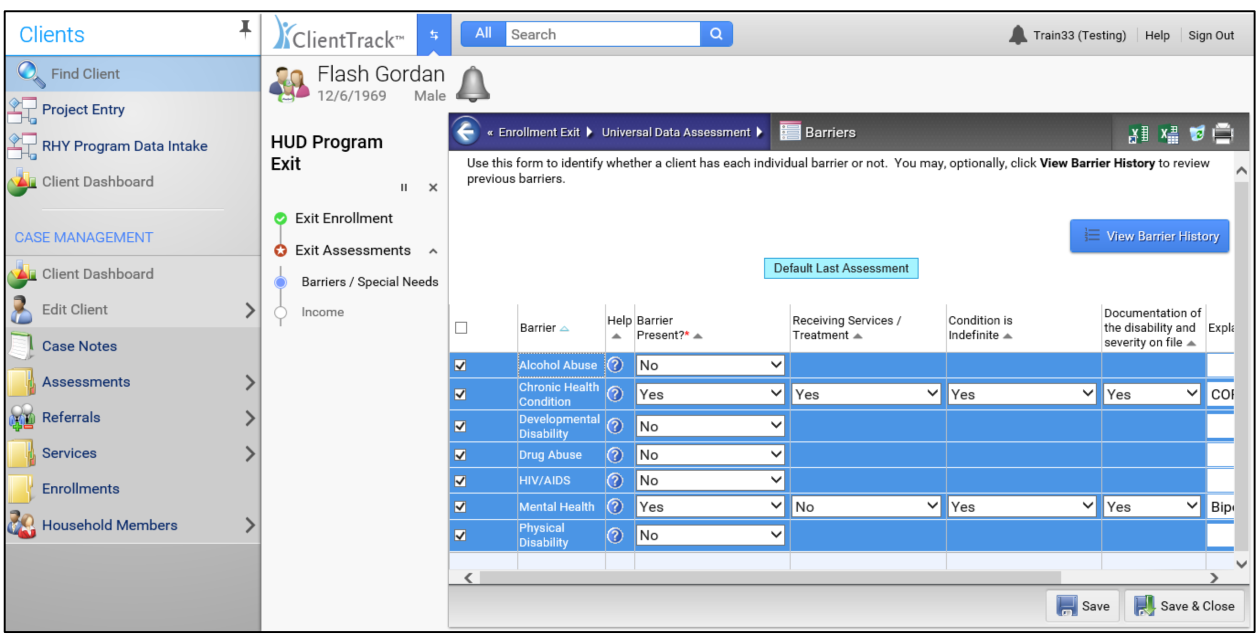
HMIS Universal Data at Exit

Complete the required information and click **"Save"** to continue.



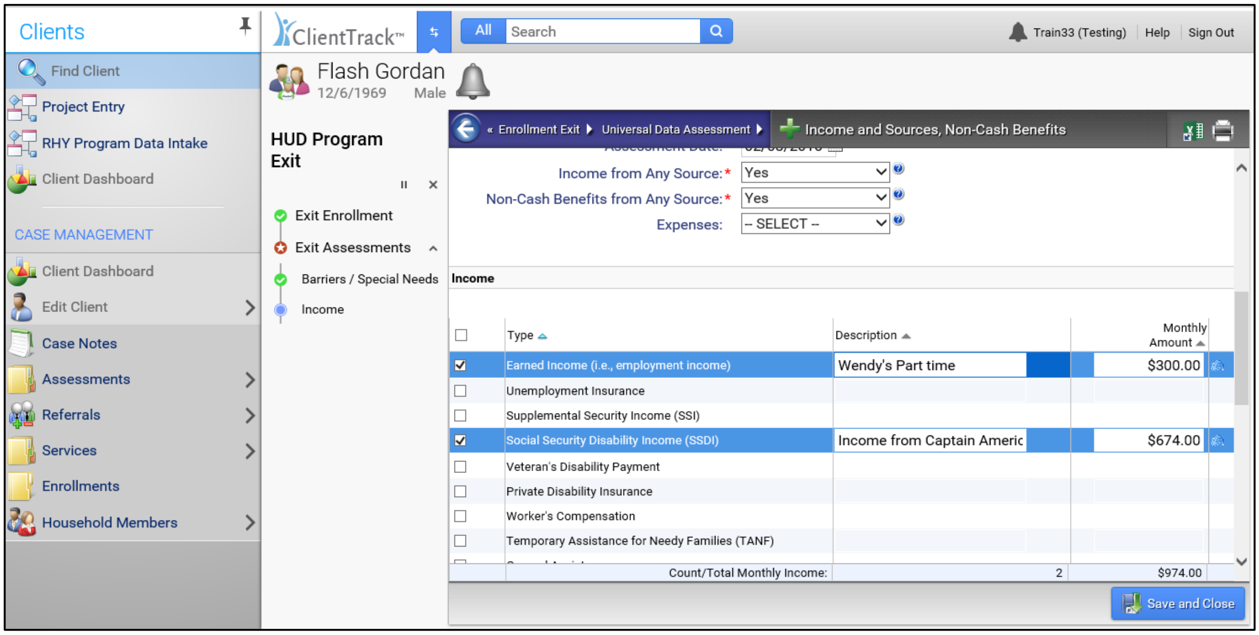
HMIS Barriers at Exit

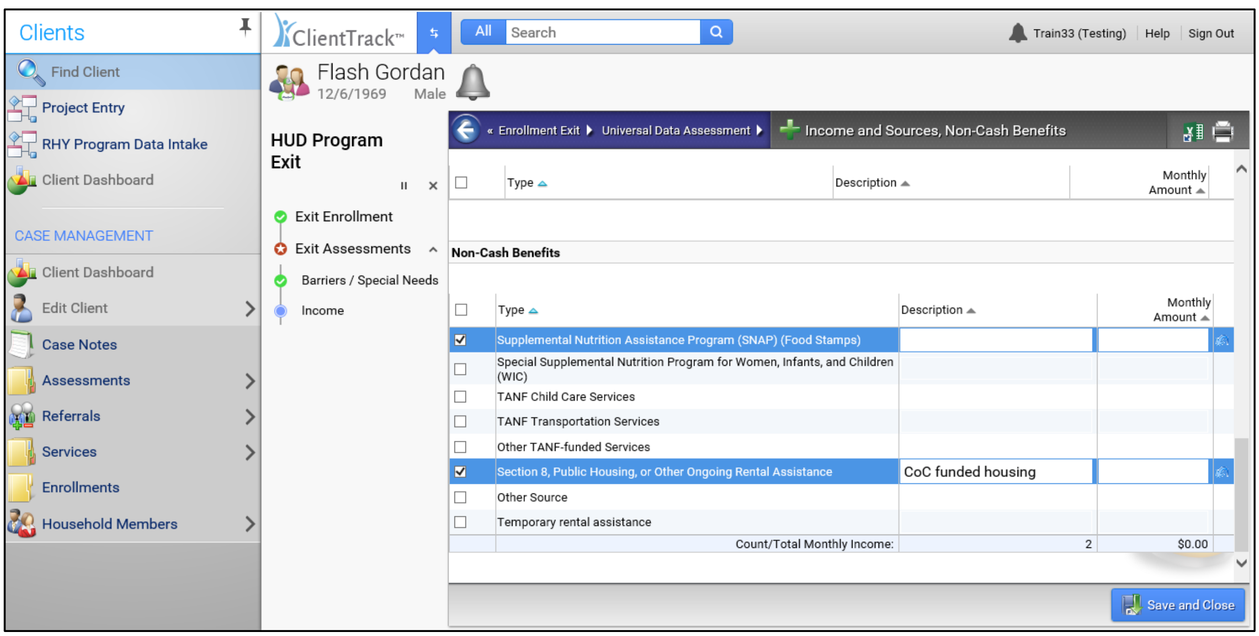
You will be required to complete the HMIS Barriers Assessment at exit. The built in logic may create additional required fields. Select a barrier by clicking on the box beside it if a barrier is present at exit. If the client has no barriers, click on **"Save & Close"** in the lower right hand corner.



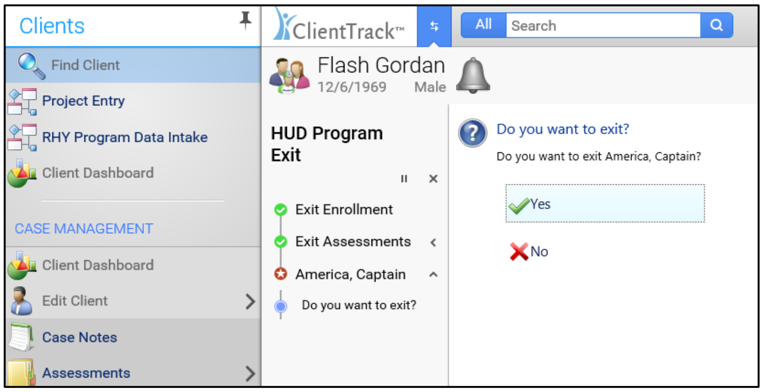
Financial Assessment at Exit

Complete the Financial information for the head of household at exit and document any changes to the household income. Be sure to scroll down to complete Non-Cash Benefits and click **"Save and Close"** when finished.





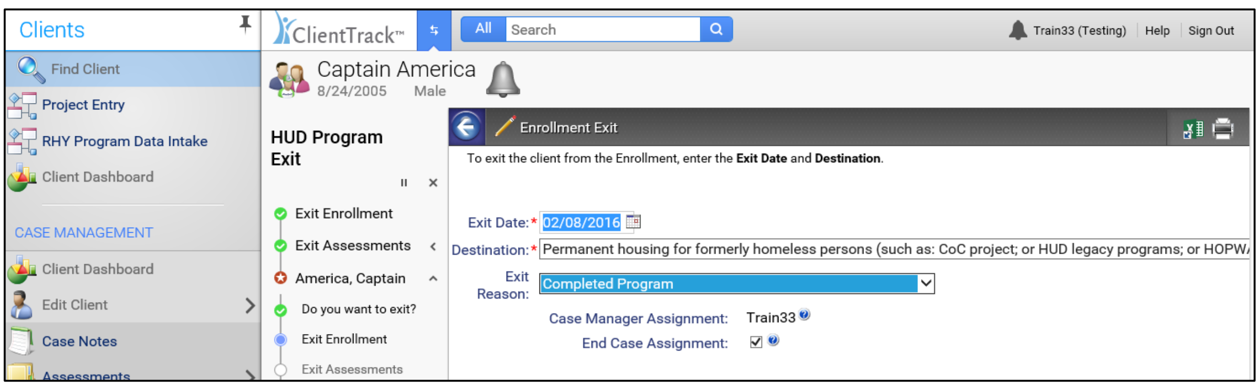
Exit Workflow for Child

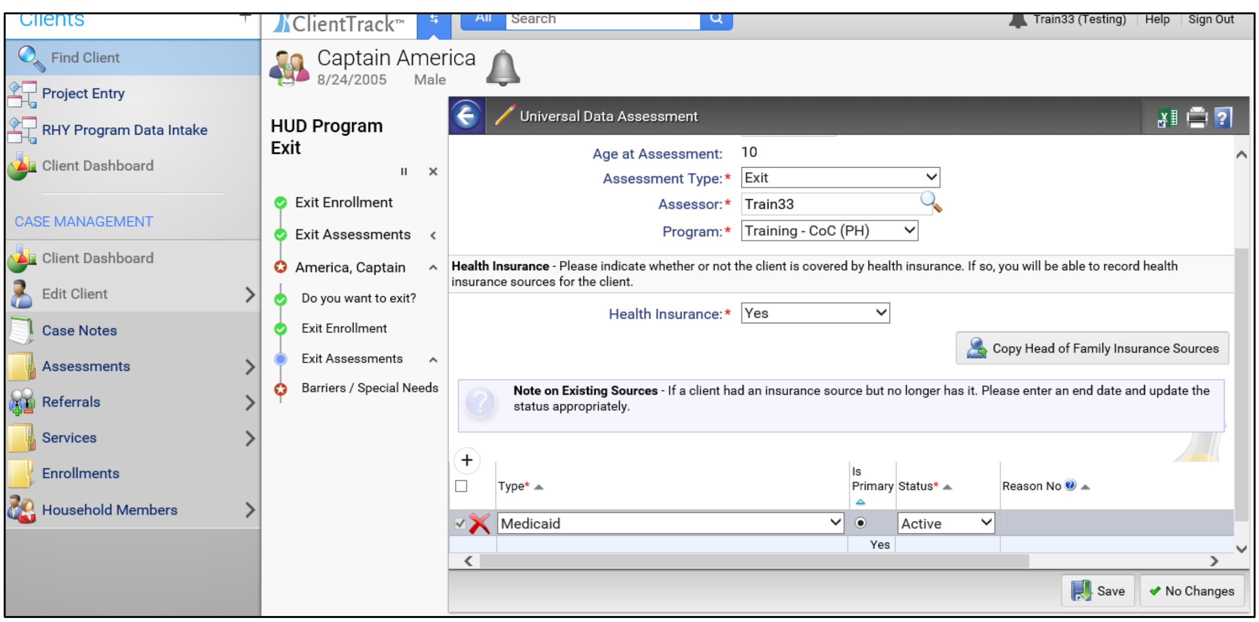


After completing all of the exit assessments for the head of household, you will be prompted through the exit assessments for all enrolled household members. The adult exit assessments will look like the head of household's assessments. The exit assessments will look differently for children. The "**Destination**" is required for all household members being discharged from the project.

HMIS Universal Data Assessment at Exit for Child

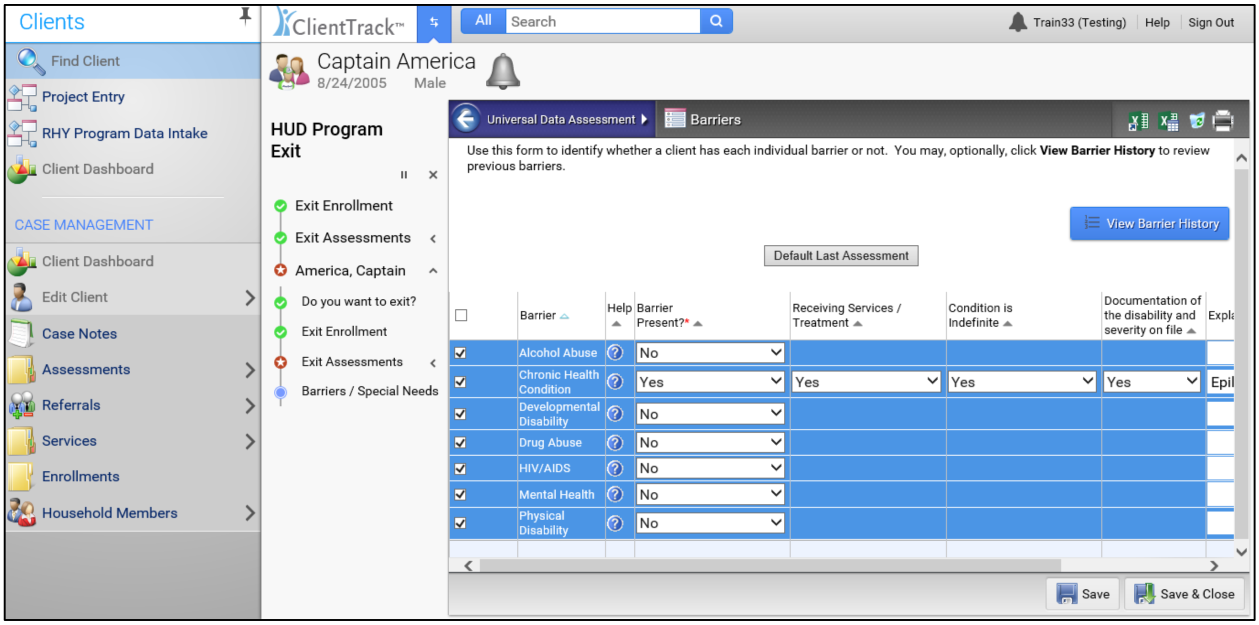
Complete the required information on the HMIS Universal Data Assessment at exit for the child and click "**Save**" to continue.





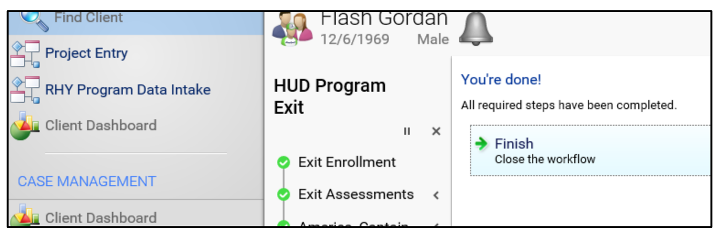
HMIS Barriers Assessment at Exit for Child

Complete the Barriers Assessment for the child at exit. If no barriers are reported, click **"Save & Close"** to continue in the workflow.



Completing the Exit Workflow

When you have completed all exit assessment for all household members, you will be asked to finish the exit workflow. Click **"Finish"** to complete the discharge for your clients.



You will then return to the client dashboard where you can see the project exit dates now as see below. If you have also selected **"End Case Assignment"** on the exit workflow, you will see that your status has changed to **"Inactive"** on the client dashboard under **"Case Manager Assignments."** If you forgot to click on the box beside **"End Case Assignment"** during the exit workflow, you can click on the little notepad beside your name under "**Case Manager Assignments"** to edit your status to **"Inactive"** to remove the discharged client from your case load.

Unique Project Requirements at Exit

There are variations in data requirements for different project exits. Below are screenshots of the unique discharge requirements during the exit workflow for the following projects:

1. PATH
2. HOPWA
3. RHY

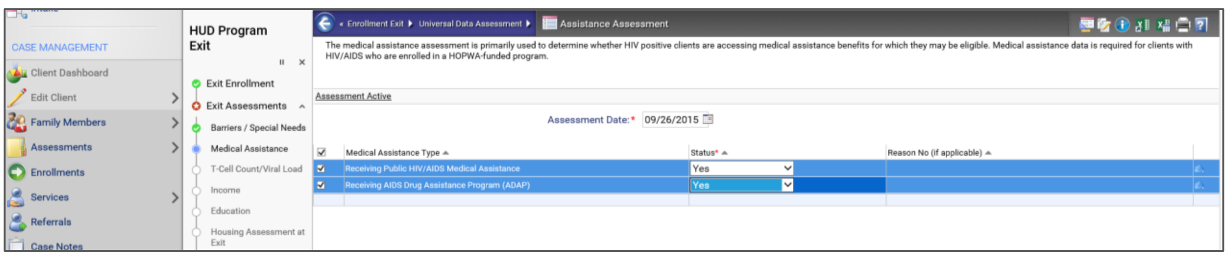
1. PATH EXIT

For PATH clients being discharged, their **"Date of PATH Status Determined"** and their **PATH enrollment status** will be required during the exit workflow on the **"Enrollment Exit"** screen as seen below. This information should have been entered on the Update/Annual Assessment. The system will give you one last opportunity to add this information.

If no referrals were made or no case notes entered, click **"Skip"** to proceed in the workflow.

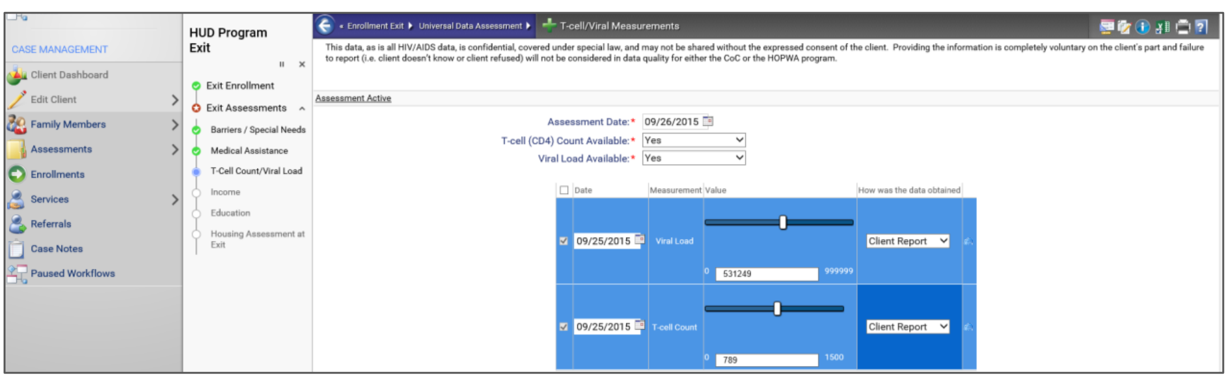
2. HOPWA EXIT

A completed Medical Assessment will be required at exit for HOPWA.



T-Cell Count and Viral Load data will also be required at exit for the client when being discharged from HOPWA.

A housing assessment will be required at exit for HOPWA clients as seen below.

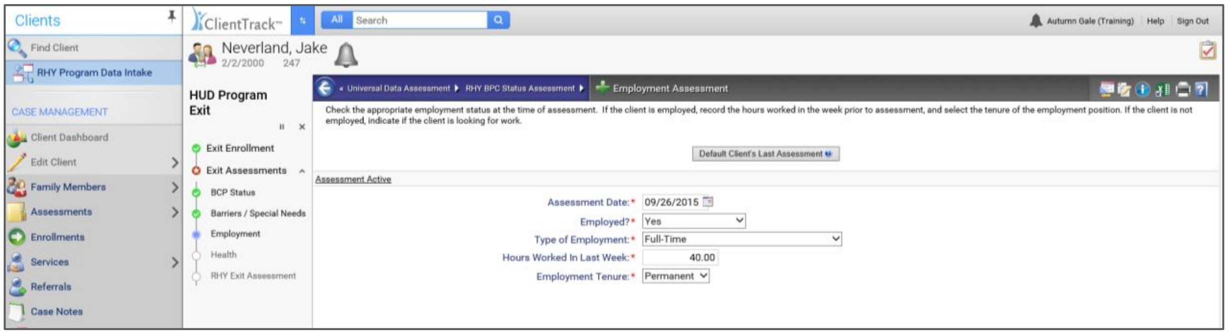


3. RHY EXIT

In addition to the other exit assessments, RHY clients will complete the following exit assessments:

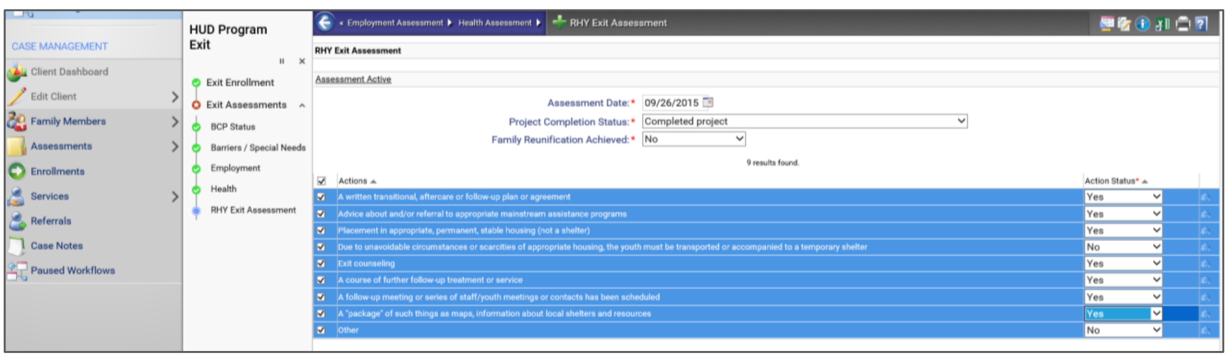
Basic Center Plan Enrollment Status Assessment – Complete the required data and click **"Save"** to continue.

Employment Assessment – The built in logic will require additional information depending on the client's employment status. Click **"Save"** to continue.



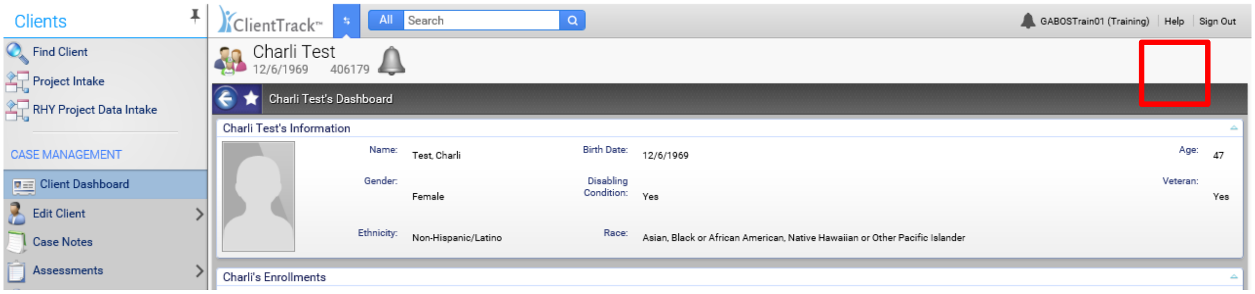
Health Assessment – Complete the required fields and click **"Save"** to continue in the workflow.

Project Completion and Actions Assessment – The built in logic will require additional information depending on the client's responses. To move forward on this assessment, click all of the **"Actions"** and change the default **"Action Status"** to **"Yes"** for those follow up items. Click **"Save"** to complete the workflow.

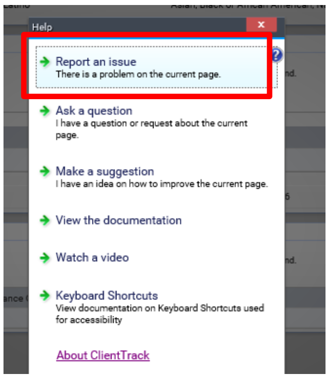


SUBMITTING AN ISSUE OR REQUEST ASSISTANCE

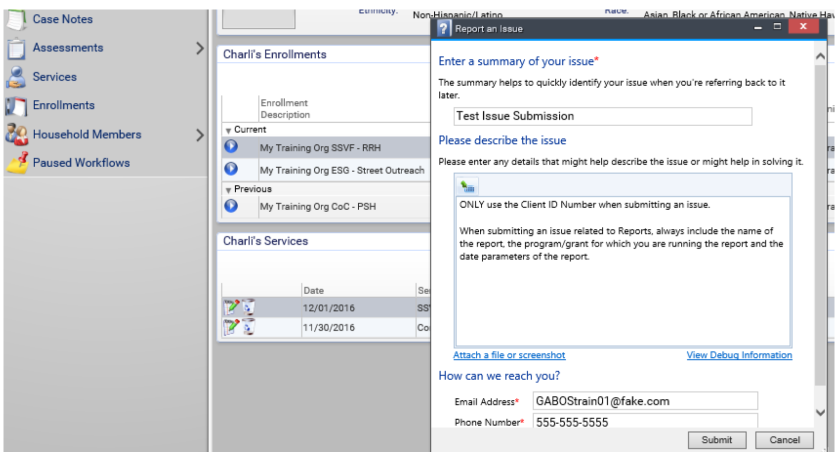
If you need assistance logging into the HMIS, please email the HMIS Support Staff at GAHMISsupport@dca.ga.gov. If you need assistance after logging into the HMIS, please follow the steps listed below. Click on the "**Help**" link in the upper right corner of the screen.



Select the "Report an Issue" option from the menu.



Enter a Subject/Summary and then add the specifics of your reason for contacting the HMIS Support Staff in the body of the issue statement. Please be very specific when you submit an issue to limit the number of times HMIS Support Staff need to reach out for clarification. Do NOT send client names, dates of birth or social security numbers via email or to the HMIS Support Staff. Identify clients using their unique Client ID number located in the header of the Client Dashboard.



You will receive an email that the issue has been submitted, when the issue is assigned and when the issue is resolved. You can also review the tickets you submit and add additional comments by going to the Issues Workspace.

Basic Reports

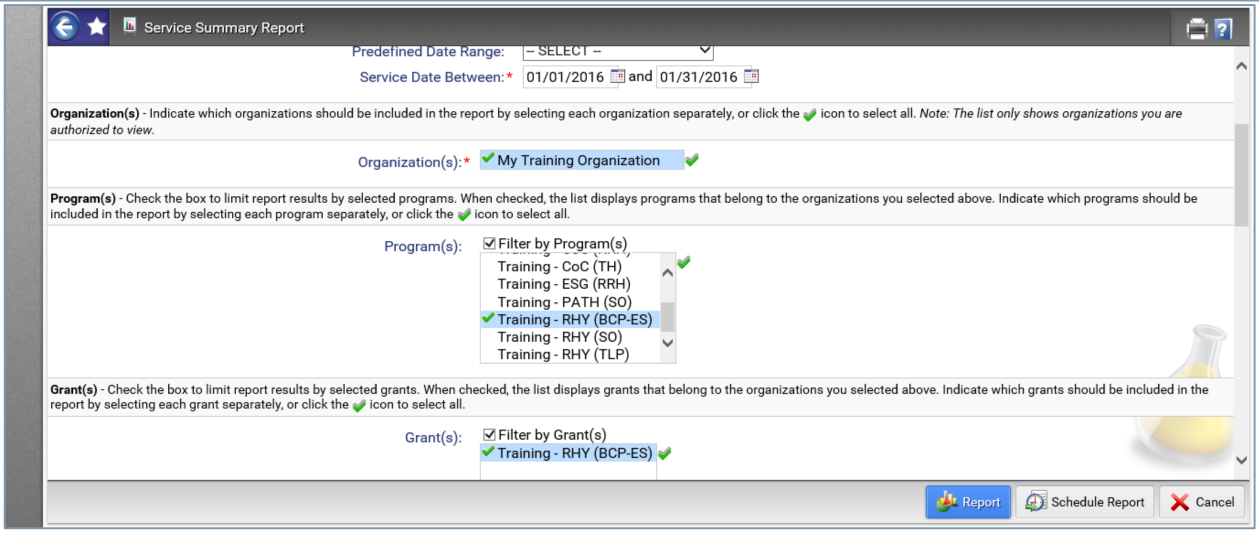
SERVICE SUMMARY REPORT

The Service Summary Report is a report of the services your agency has provided for clients enrolled in a specific project. You can run a Service Summary Report a variety of ways to extract specific service information from client records, for example services rendered in the Month of December or Case Management Services provided for the year, etc. Most often the Service Summary Report is used to submit for reimbursement.

To Run a Service Summary Report:

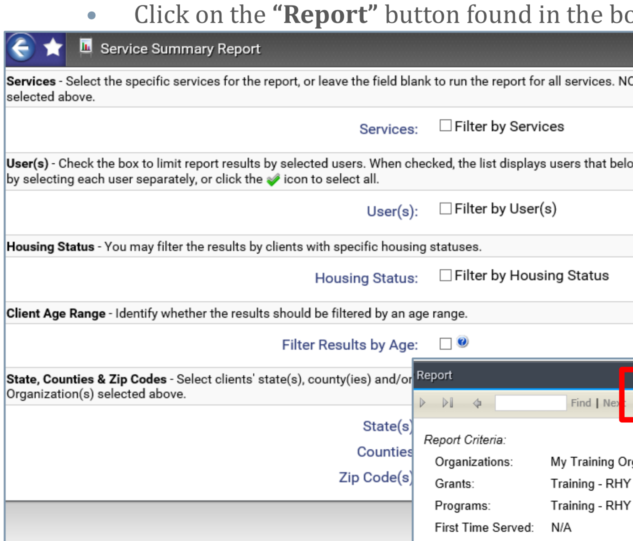
- Click on **"Reports"** found in the list of options in the upper left-hand corner of your User Dashboard, just below "My ClientTrack."
- Hover over the **"Service Reports"** folder found in the list of links on the left-hand side of the screen. Another list of reports should appear as you hover on the "Service Reports" folder.
- Hover on the **"Service Summary Reports"** link that appears first in the list of "Service Reports."
- Click on **"Service Summary"** link that appears first in the list of "Service Summary Reports" after hovering over it.

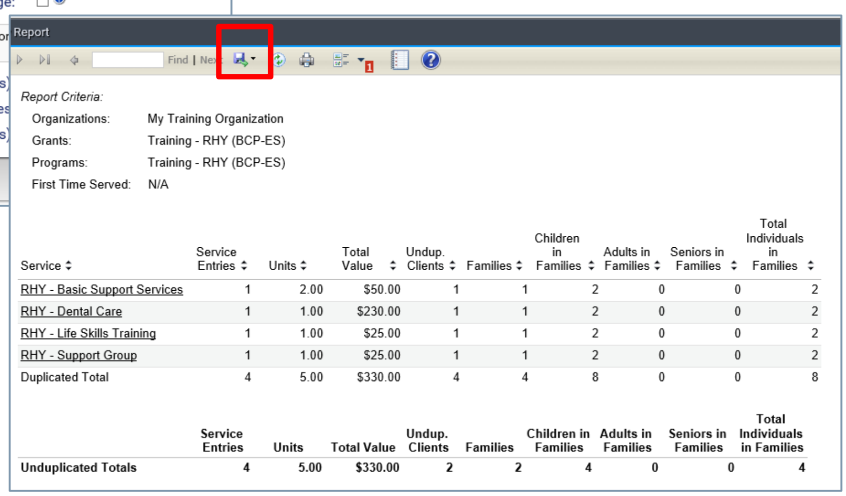
- Set up your report parameters by: *(Please note that all fields with an asterisk * are required fields)*
- **Completing the date range** – There are a couple of options for setting the date range. You can select from the **"Predefined Date Range,"** though this may not provide you the exact dates you need. You can fill in the dates found below this labeled **"Between."** The first date box is the beginning date and the second date box is the ending date, for example, 01/01/2015 and 12/31/2015. This will give you all of the clients in your project for the entire year of 2015.
- **Filtering by "Projects"** – Select the **"Project"** you want to run a Service Summary for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a project. You can run multiple projects on the same report. Simply select more than one **"Project"** by clicking on the name in the box. Again, you will see the green check mark to indicate you have selected it. To unselect one, simply click on it again and you will see the green check mark disappear.
- **Selecting "Grants"** – Select the **"Grant"** you want to run the report for by clicking on the name in the box. A green check mark should appear to show that you have successfully selected a grant. You can run multiple grants on the same report. However, your grant options will be dictated by the "Project(s)" you selected in the "Filter by Project(s)" box. If more than one grant appears, simply select more than one **"Grant"** by clicking on the name in the box. To deselect one, simply click on it again and you will see the green check mark disappear.



- **Filtering by Services, User(s), Housing Status, Results by Age, State(s), Counties, Zip Code(s) and more –** Select a variety of parameters to extract more specific service data from clients your organization has served. Most of these selections will allow you to select more than one option in the box. Again, simply click on the option in the box and a green check mark will appear. To unselect an option, click on it again and you will see the green check mark disappear.

- Click on the **"Report"** button found in the bottom right-hand corner of the screen. This will begin running your report. You should see your report pop up in a new window within seconds. You can export your report to a pdf file for email transmission or record-keeping by clicking on the PDF icon in the upper right-hand corner of the report window.



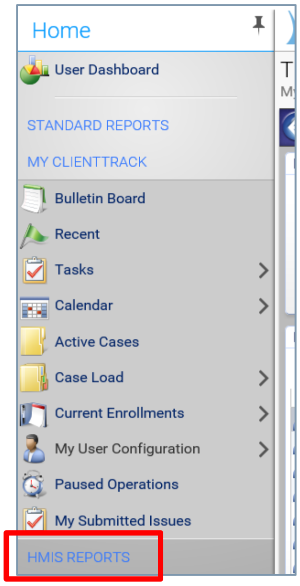


Service	Service Entries	Units	Total Value	Undup. Clients	Families	Children in Families	Adults in Families	Seniors in Families	Total Individuals in Families
RHY - Basic Support Services	1	2.00	$50.00	1	1	2	0	0	2
RHY - Dental Care	1	1.00	$230.00	1	1	2	0	0	2
RHY - Life Skills Training	1	1.00	$25.00	1	1	2	0	0	2
RHY - Support Group	1	1.00	$25.00	1	1	2	0	0	2
Duplicated Total	4	5.00	$330.00	4	4	8	0	0	8

	Service Entries	Units	Total Value	Undup. Clients	Families	Children in Families	Adults in Families	Seniors in Families	Total Individuals in Families
Unduplicated Totals	4	5.00	$330.00	2	2	4	0	0	4

Quick Reference Guide for the Annual Performance Report (APR)

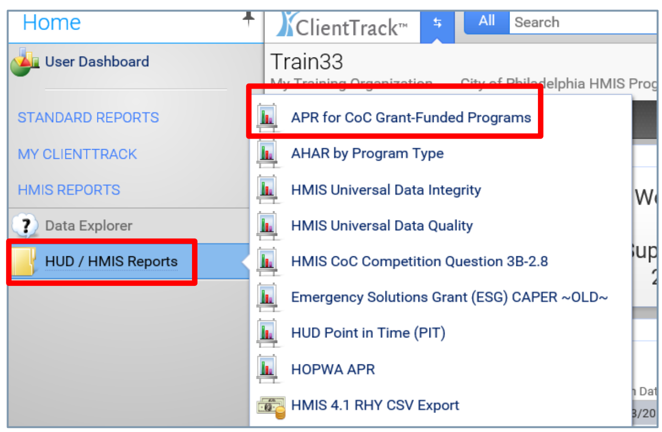
The APR is a comprehensive report of your project – who you served and how you served them. It is recommended that you run an APR often throughout the year to track missing data so that your report is complete when it is time for the annual submission. Here are quick steps to running the report and cleaning up missing data.



To Run an APR

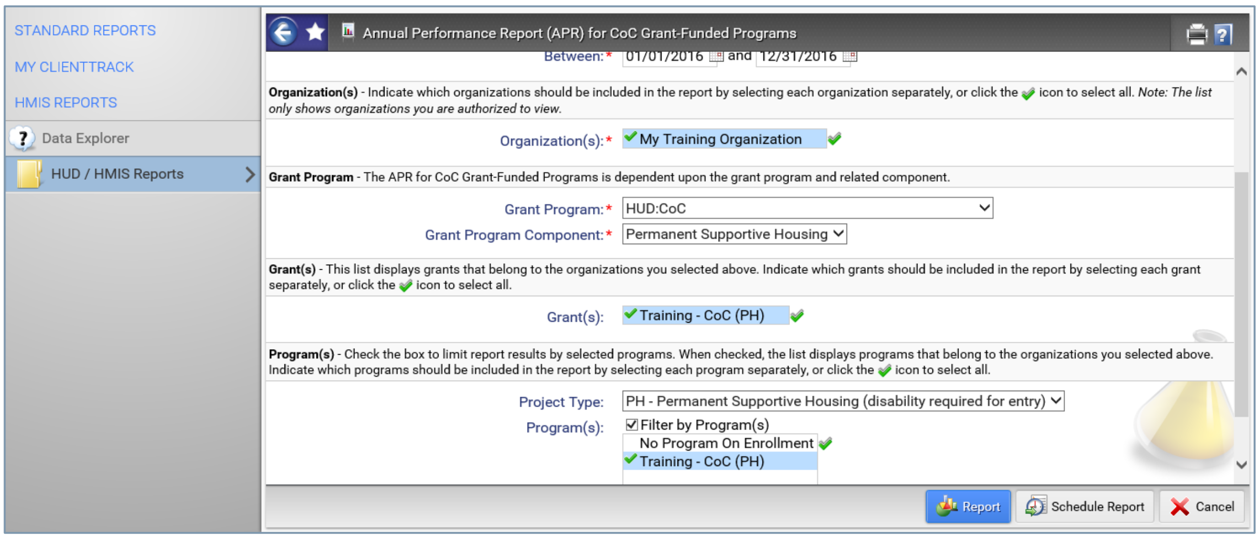
- Click on **"Reports"** found under "My ClientTrack" in the upper left-hand corner of your user dashboard.
- Hover on the **"HMIS Reports" folder** found in the list of links in the upper left-hand corner of the screen. A list of reports should appear to the right after hovering on the "HMIS Reports" folder.
- Select **"APR for CoC Grant-Funded Projects"** first in the list of reports that appear to the right when hovering on the "HMIS Reports" folder.

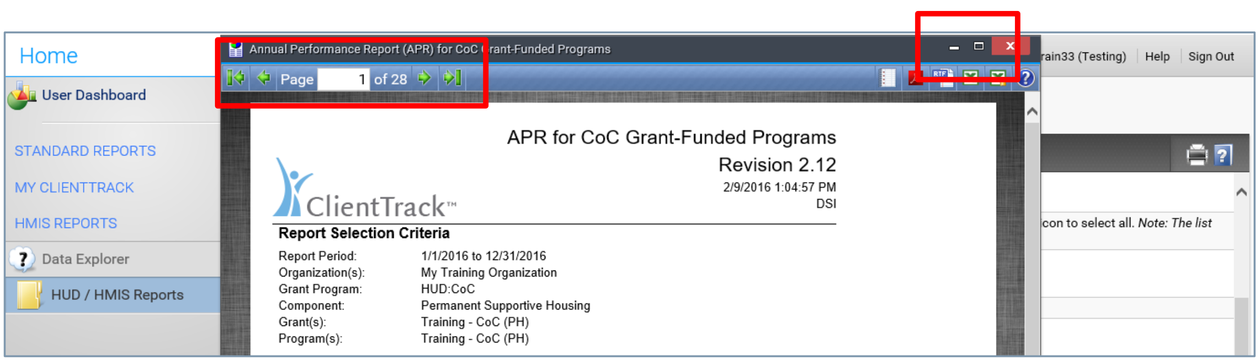
- Set up your report parameters by:
    - **Completing the date range** – There are a couple of options for setting the date range. You can select from the "Predefined Date Range," though this may not provide you the exact dates you need. You can fill in the dates found below this labeled "Between." The first date box is the beginning date and the second date box is the ending date – for example, 01/01/2013 and 12/31/2013. This will give you all of the clients in your project for the entire year of 2013.
    - **Choosing the "Grant Project" and "Grant Project Component"** - Select the grant your project is under in the drop down for "Grant Project." This will prompt the next selection in "Grant Project Component." If you do not know this information, feel free to try several selections to find the correct options for your project. You won't break it by choosing different options. If you do not see the correct set up information here, contact the HMIS Help Desk by emailing GAHMISsupport@dca.ga.gov.
    - **Selecting "Grants"** – You may see several options to choose from after selecting "Grant Project" and "Grant Project Component." The aforementioned Grant Project and Grant Project Component will determine the options you see in this box. Select the "Grant" you want to run the APR for by clicking on the name in the box. A green check mark should appear inside the box to show that you have successfully selected a grant. You can run multiple projects on the same report. Simply select multiple "Grants" by clicking on the name in the box. Again, you will see the green check mark inside the box to indicate you've selected it. To unselect one, simply click on it again and you will see the green check mark disappear.



- **Selecting "Project Type"** – Click on the drop down box to select your Project Type. What is selecting in Project Type will determine what projects you can select in the next step – "Filter by Projects."
- **Clicking on "Projects: Filter by Projects"** to select your project. Same set up as "Grants." To select a project click on the name in the box and a green check mark will appear inside the box to show that you have successfully selected it. Multiple projects can be selected here as well. To deselect a project, click on it again and the green check mark should disappear indicating the project is no longer selected for the report.

- Click on the **"Report"** button found on the bottom right-hand side of the screen. This will begin running your report. You should see your report pop up in a new window within seconds.

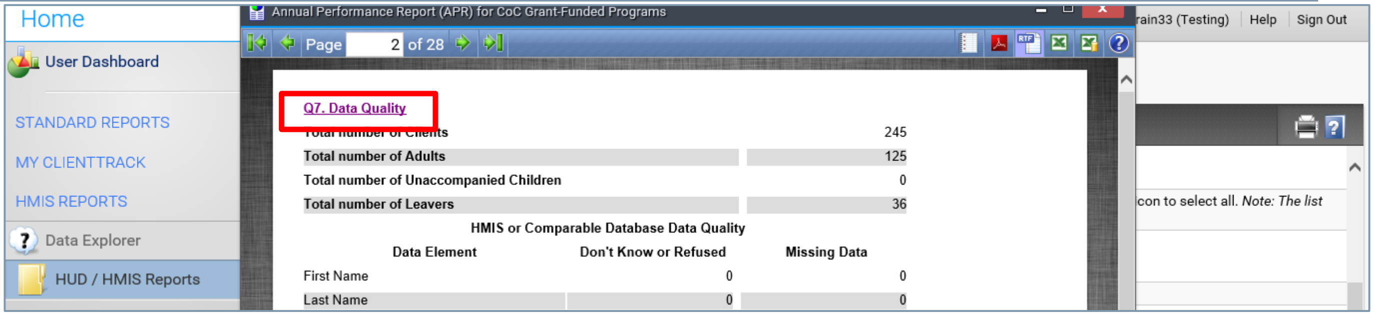




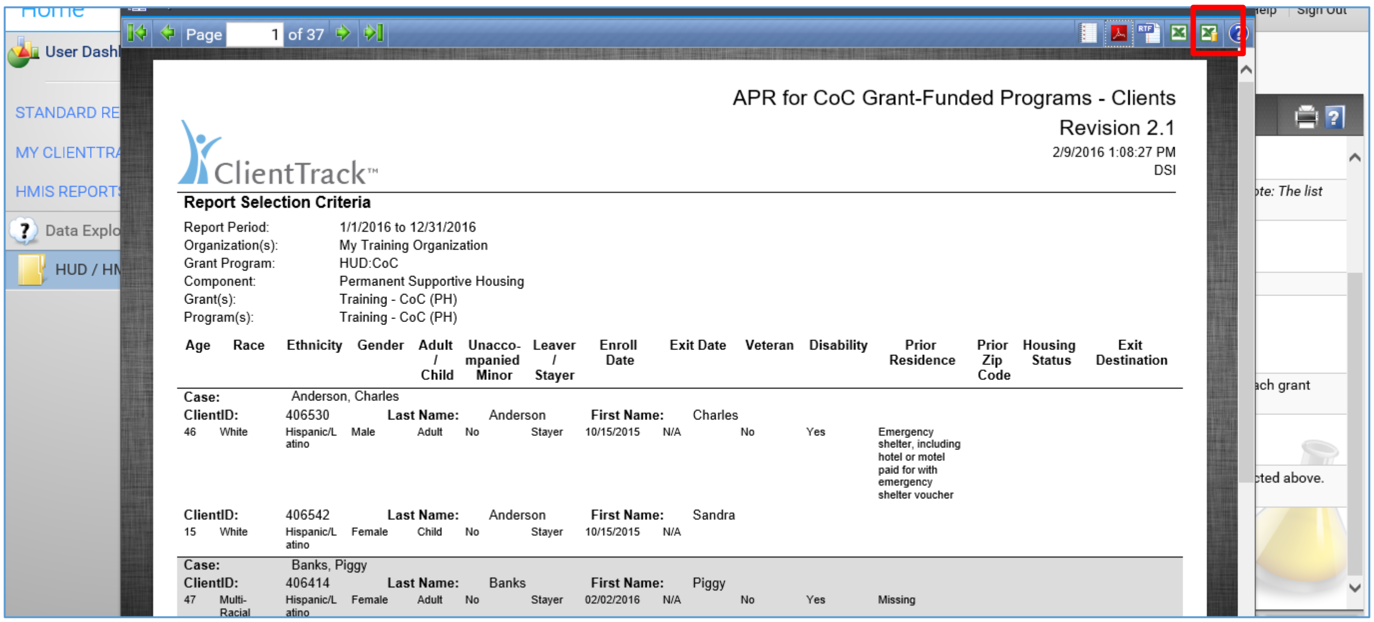
<u>To Drill Down and Find Missing Data</u>

After your report populates and opened in the new window, you can click through with the green arrows at the top of the window and see where you have "Missing" data. To find clients who are missing data, follow these steps:

- Click on the **blue link** for that section where you are missing data – for example "Q.7 Data Quality." **Please note that not all sections have a link to select. You may be able to find this missing data in another section of the report or you can contact the HMIS Help Desk for assistance.*



- Another window should pop up with more detailed information for this section. You may be able to find your missing data in this screen, but it may be more helpful to **export it** to find the missing data.



- To export, click on the **Excel icon with the gold spindle** in the upper right-hand corner of the new window that appears after clicking on the section header. You may be prompted to open the document, click on "Open" to open the Excel spreadsheet with the client data. **If you are prompted to save the spreadsheet before opening it, please change your download settings on your Internet browser to automatically open downloads so no client information is saved to your computer when exporting.*
- You will see the word **"MISSING"** on the spreadsheet where you are missing data. The columns are labeled at the top of the spreadsheet and client names are on the far left-hand side of the spreadsheet. You can then go to client records and complete the missing data. Please remember, some data elements are not required for ALL clients. For example, you may see "missing" listed for the domestic violence assessment for a child under the age of 18, however, the domestic violence assessment is not required for children.

To Complete Missing Data on a Client Record

Once you have identified which clients are missing important data on your APR, you can edit the client information with the appropriate steps below.

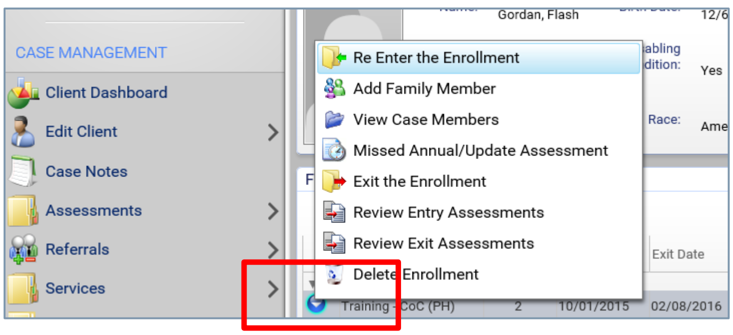
To Edit Disabling Condition or Veteran Status

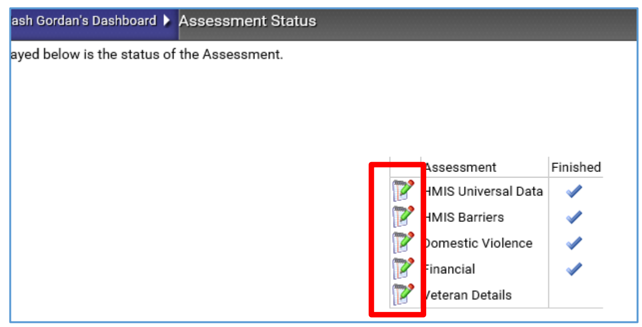
- Go to the client record for whom the Disabling Condition or Veteran Status is missing.

- Click on **"Edit Client"** in the list of case management tools found on the left-hand side of the client record.
- Scroll down to **"Disabling Condition"** or **"Veteran Status"** and update the information with the drop down box provided.
- Scroll down and click **"Save"** to save the changes to the client record.

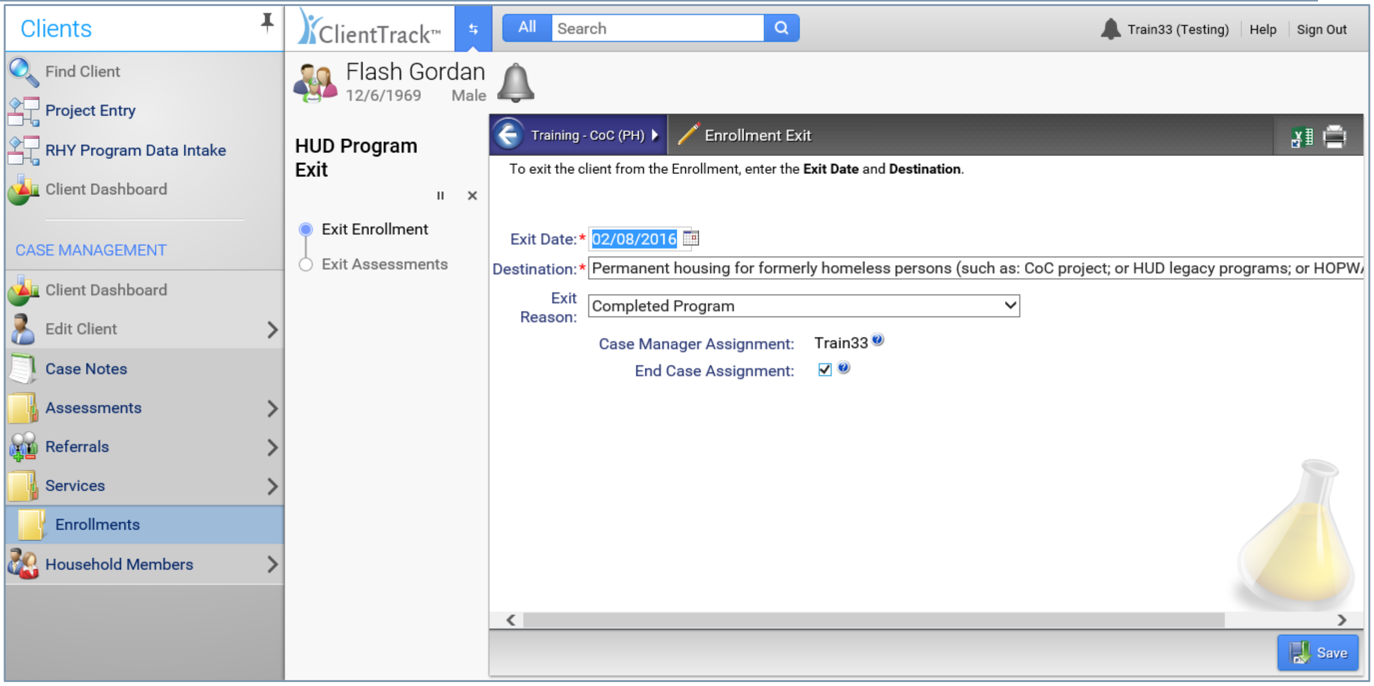
To Edit Entry or Exit Assessments (including Prior Residence Data, Domestic Violence Assessment, Financial Assessment and more)

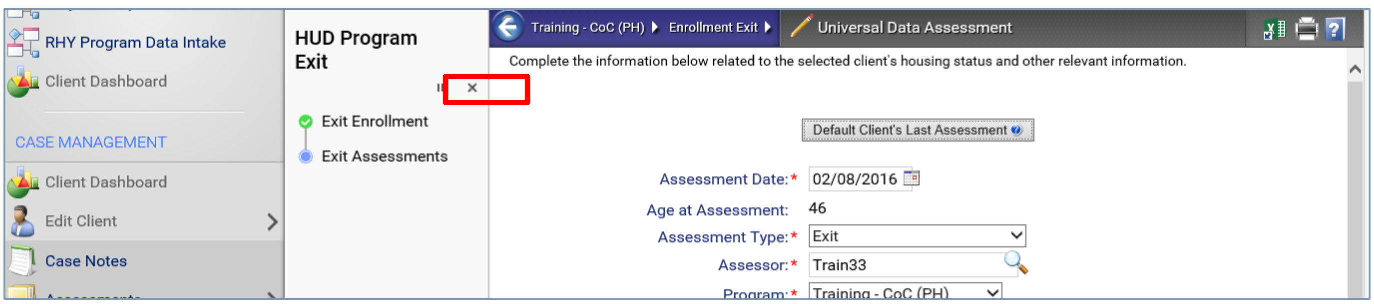
- Go to the client record for whom entry or exit data is missing.
- Click on the blue play button beside your project enrollment located centrally on the client record.
- Select **"Review Entry Assessments"** or **"Review Exit Assessments"** in the drop down list that appears after clicking on the blue play button.
- Edit the entry or exit assessments by clicking on the little notepad beside the specific assessment you wish to update.
- Click **"Save"** to save the changes to the assessment and you will return to the list of entry or exit assessments.





Please note to change the exit destination or exit reason, you will need to exit the client again to access these specific data fields as they are not included in the list of exit assessments when reviewing exit assessments. Once you have started the exit workflow, edit the destination or reason and click on "Save." When you go to the next screen in the exit workflow, click on the black "X" in the upper right-hand corner of the exit workflow window located in the upper left-hand corner of the client record. This will cancel the exit workflow, saving your changes and saving your previous exit assessment information.





If you need any assistance running your APR or finding and completing missing data, contact the HMIS Help Desk at GAHMISsupport@dca.ga.gov.